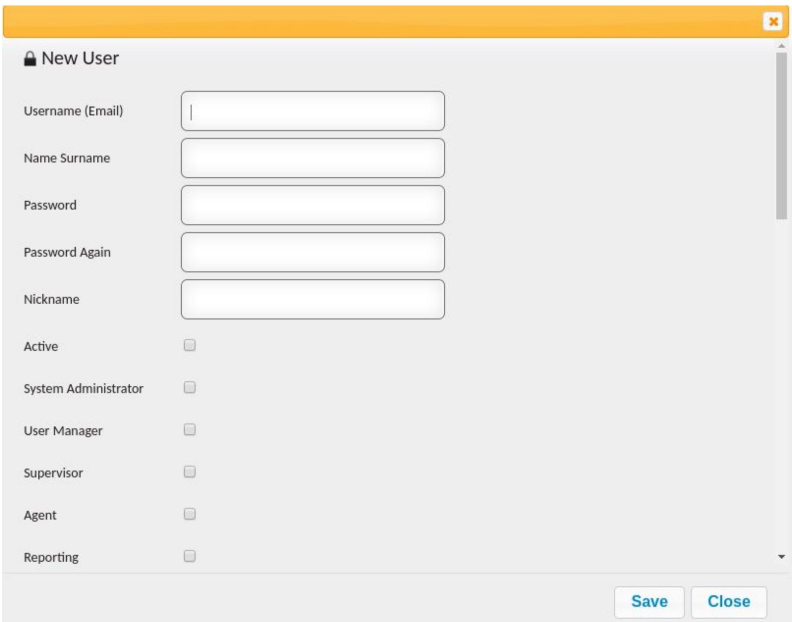
Users

Users registered in the system are displayed in this section. Adding new users, deleting existing users, authorizing users, determining roles, and notification settings are all carried out here.

Adding a Users

1. Click the add new user button,  , located in the top right corner of the page. The following pop-up will appear:



Note: All of the user functions are not displayed; the scroll bar has to be used.

2. Click the “Username (Email)” input box, type the user’s email address an example is shown below:

   Note: This is a mandatory field

3. Click the “Name Surname” input box, type the user’s name and surname an example is shown below:

   Note: This is a mandatory field

4. Click the “Password” input box, type a password for the user. An example is shown below:

   Note: This is a mandatory field

5. Click the “Password Again” input box and type the password used in the “Password” input box as displayed below:

   Note: This is a mandatory field

6. If desired, a nickname for the user can be displayed. Click the “Nickname” input box, type the user’s desired nickname an example is shown below:

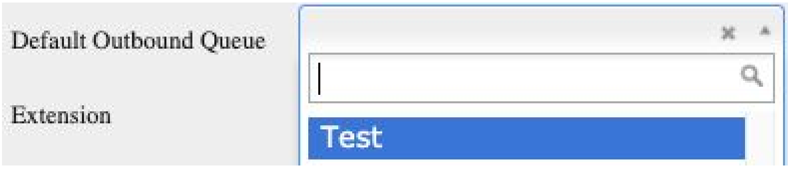
7. Underneath the “Nickname” input box, there are 13 checkboxes allowing for different user permissions, check the desired permissions that apply to the new user. The definitions for each of these checkboxes is evident below:

Active	This option demonstrates that the agent is ready to make and receive calls. This checkbox needs to be selected for the user to use Call Center Studio. Note: This is not a mandatory field. A user can not make or receive calls if this box remains unchecked.
System Administrator	If this option is checked, the user will have access to the System Administrator tab.
User Manager	If this option is checked, the user will have the authority to manage other users’ information and observe their progress. Note: This option is recommended for Supervisors.
Supervisor	If this option is checked, the user will have access to the Supervisor tab.
Agent	If this option is checked, the user will have access to the Agent tab.
Reporting	If this option is checked, the user will have access to the Reporting tab.
Quality Control	If this option is checked, the user will have access to the Quality Control tab.

Custom Application Use ☐	If this option is checked, the user will have the authority to use third-party integrations.
Extension Screen ☐	If checked, the user will have access to an extension screen that works similar to an IP Phone, used to answer calls. Can only be selected if the agent checkbox is left unchecked.
Operator Console ☐	If this option is checked, the user will have access to the Operator Console.
Only Use IP Phone ☐	This option is only for telephone usage instead of the softphone located in the Agent Module. *Note 1: Checking this box means that the Agent Screen will not be used. Only an IP Phone will be used to make and receive calls.* *Note 2: It can only be selected if the agent checkbox is left unchecked.* *Note 3: If this option is selected, the extension screen option will be selected by default.*
Use IP Phone ☐	This option is for IP Phone users.
Enable IP Restriction ☐	Restricts access to the system based on IPs mentioned in the ***Allowed Address*** section below. When checked, a separate address can be used to log in. Below this check is the ***"Allowed Addresses"*** input box, type the desired address.

8. Click the “Allowed Addresses” input box, type the allowed addresses in the layout shown below:

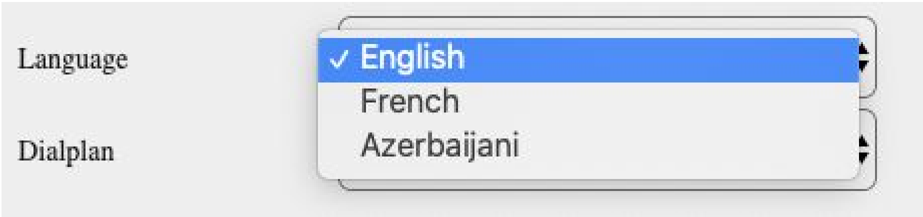
9. Click the desired “Default Outbound Queue”, from the dropdown list. If done correctly, the selection will look like the picture below:



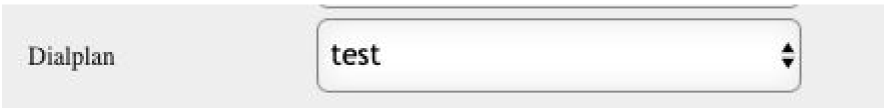
10. This option defines an extension number for the user within the system. Click the “Extension” input box, type the extension in the layout shown below:

11. Click the "Mobile Number" input box, type the mobile number in the layout defined in the Dialer section. *(See* ***Dialer*** *Section)*

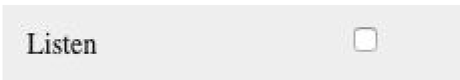
12. Click the desired “Language”, from the dropdown list, if down correctly, the selection will look like the picture below:



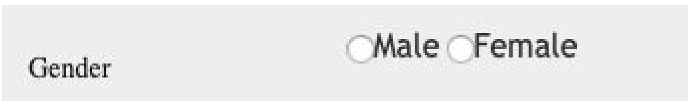
13. Click the "Mobile Number" input box, type the mobile number in the layout defined in the Dialer section.



14. Check the following box to be able to listen to the agent on the phone. (Note: If the listen checkbox is not checked, a notification will appear on the supervisor’s screen, stating the supervisor does not have access to listen.

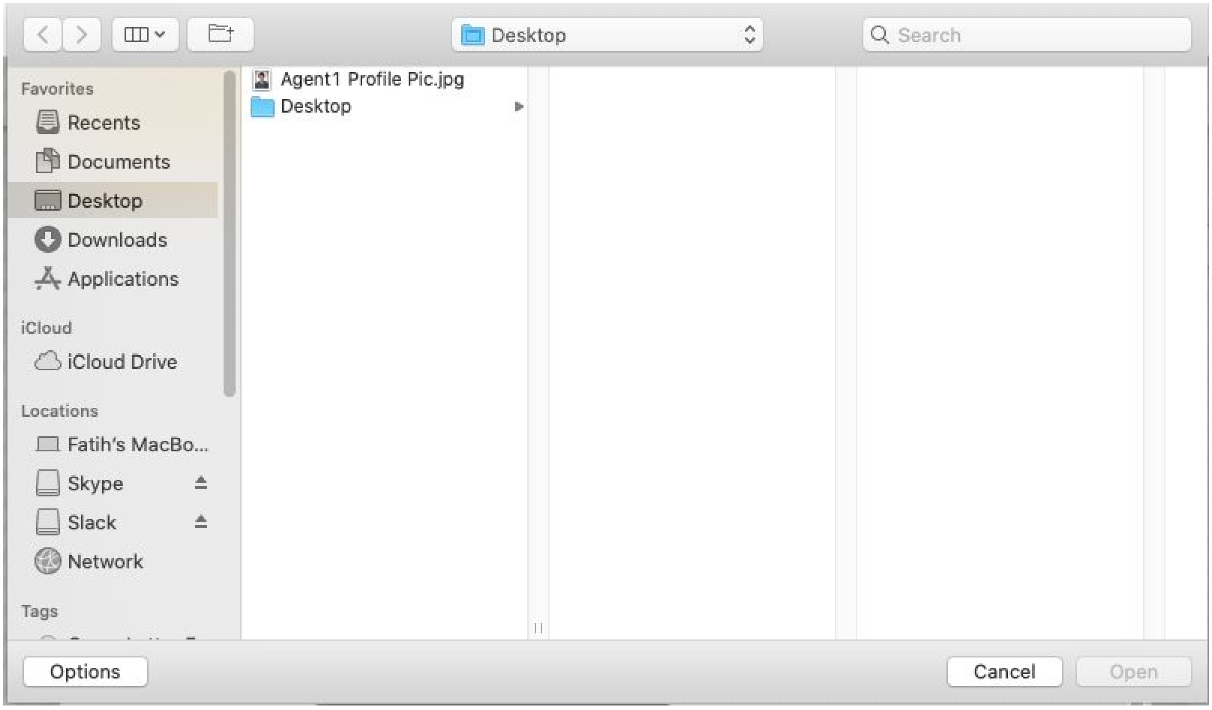


15. Click the following box, based on the gender of the user (If desired):



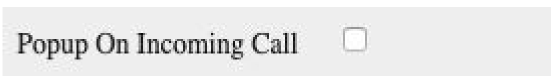
16. To add the photo of the user, press the choose file button, 

, if done correctly, the following pop-up window will be displayed:

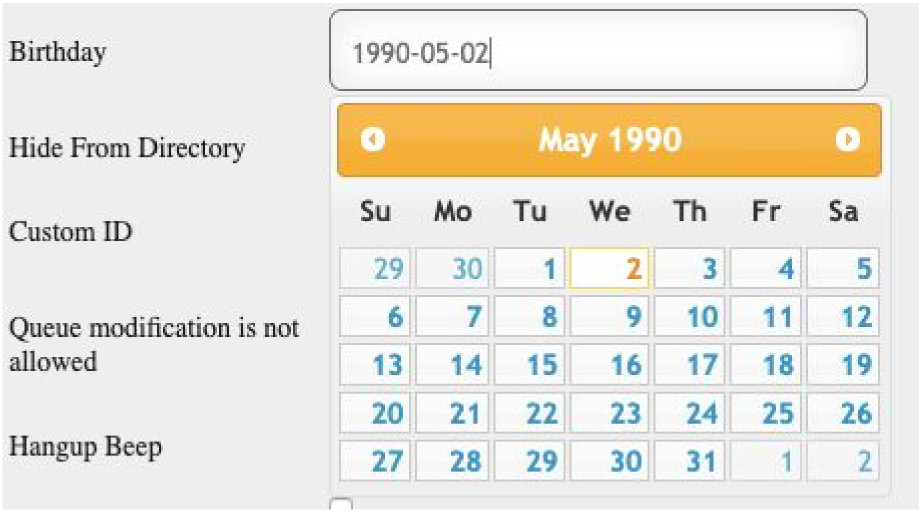


17. Choose the photo file of the user and then click the open. "Agent1 Profile Pic" file is used here as an example.
18. Once the selection is made, it will look like the picture below.

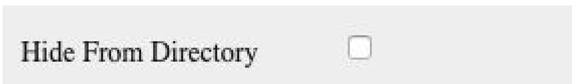
19. Check the following box to enable the Popup to answer an incoming call for a related user:



20. Click the “Birthday” input box, choose the birthday of the user in the layout shown below:



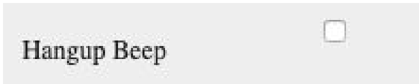
21. Check the following box to hide the user from the directory. This function makes the user invisible in the directory.



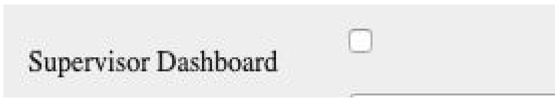
22. Click the “Custom ID” input box, type a unique ID value. An example is shown below:

23. Check the following box to disable the user to change his/her queue.

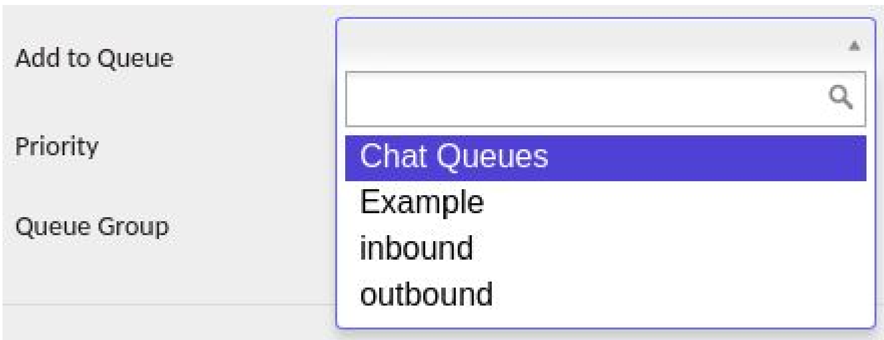
24. Check the following box to enable a sound notification after the call is hung up in the form of a beep. It helps users to understand when the call is finished.



25. Check the following box to enable the supervisor dashboard function for the related user:

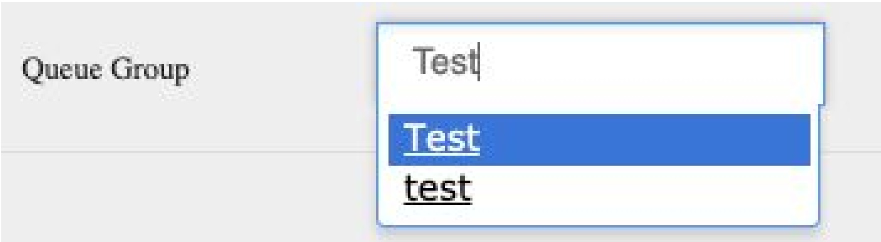


26. Click the desired "Queue" to add the user in a queue, from the dropdown list. If down correctly, the selection will look like the picture below:



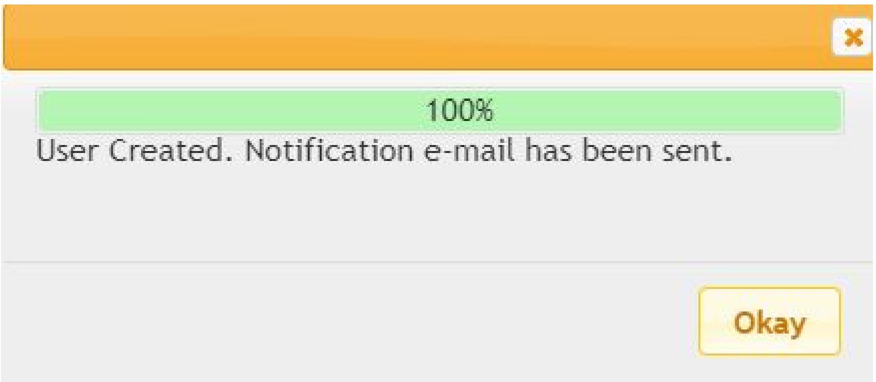
27. Click the "Priority" input box, type priority value in the layout shown below. When the call comes, it will go to the user, which has the highest priority number (100 is the highest) in the queue. If that user is not available, the call goes to the next user respectively, who has the second-largest priority number:

28. Click the desired "Queue Group" to add the user in a queue group, from the dropdown list. If down correctly, the selection will look like the picture below:



29. After all the desired additions have been made, click the save button, 

, the following pop-up window will appear:

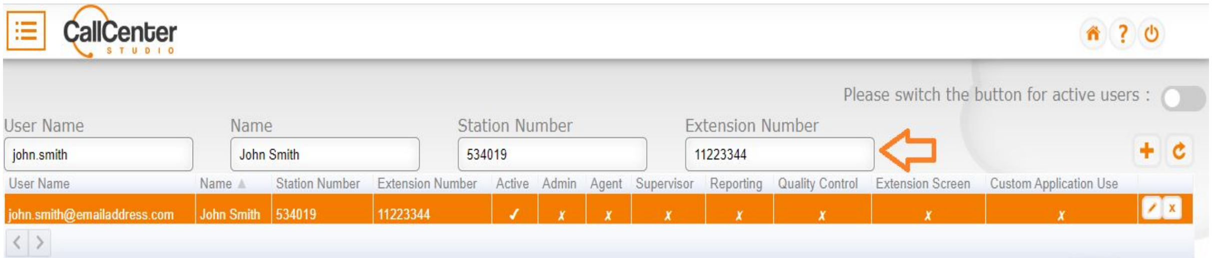


30. Click the Okay button, 

, to acknowledge the addition. A notification email will also be sent to the provided address to inform the user.

Searching For Users

There are 4 possible ways to search for users:



1. ***Searching via Email***

Type the user's registered email address to find the desired user.

2. ***Searching via Name & Surname***

Type the user's Name and Surname to find the desired user.

3. ***Searching via the Station Number***

Type the user's Station Number to find the desired user. Note that the Station Number is formed within the system and is provided while adding a user. (See ***Adding a User*** Section*)*

4. Searching via the Extension Number

Type the user's Extension Number to find the desired user.

Example: John's Station Number was set as 11223344, so this number can be typed as shown below:

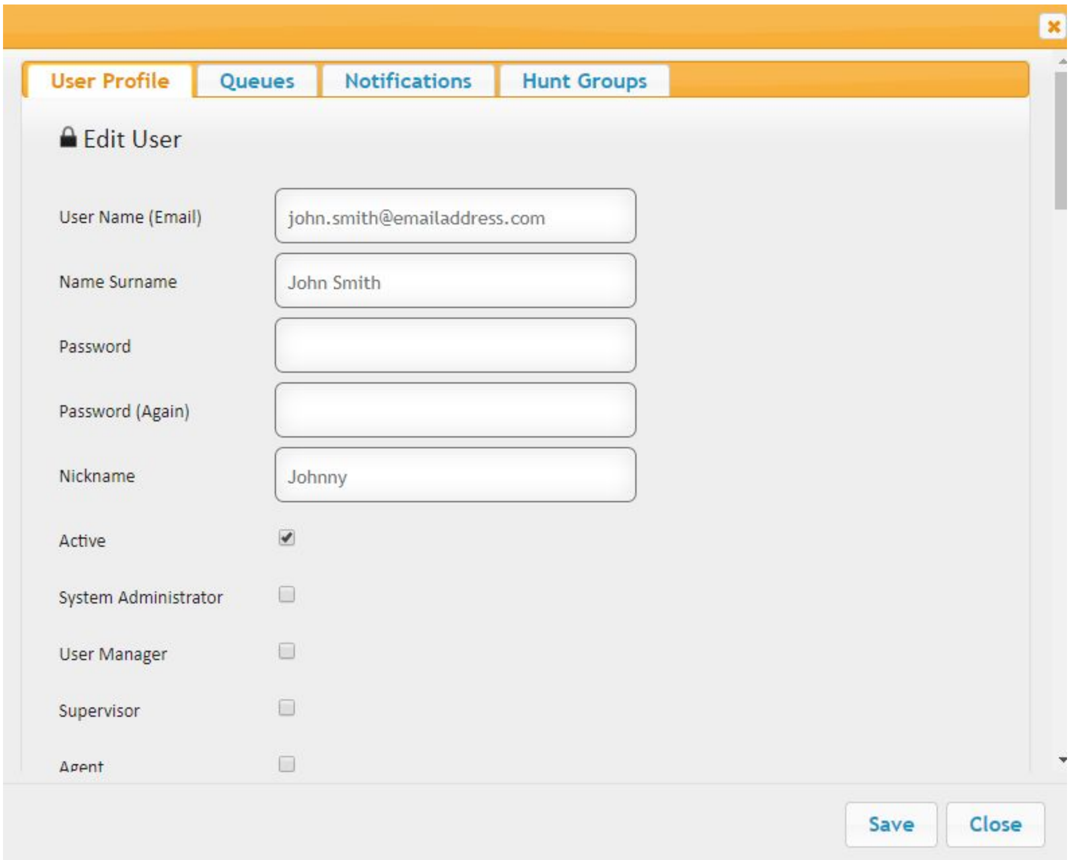
Editing a Users

After a new user is added, the edit button can be used. When the edit button is pressed, a pop-up appears, allowing the user to change the access levels and update additional information.

1. To edit a user, click the edit button, , located on the far right of the Users Name as shown below:

Right next to the edit button, the delete button is also evident. (See ***Deleting a User*** *Section).*

2. After pressing the edit button, the following pop-up appears:



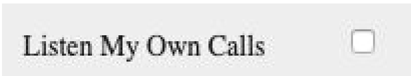
3. As evident in the picture above, 4 tabs are available in this pop-up, which are:

- *User Profile*
- *Queues*
- *Notifications*
- *Hunt Groups*

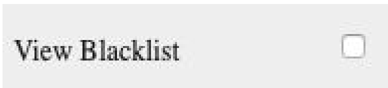
User Profile Tab

This tab is commonly used to update any sort of information of a user. Here, permissions of users can be managed and changed. Moreover, dial plan and languages can be selected, as well as various other options. All of these options are evident below:

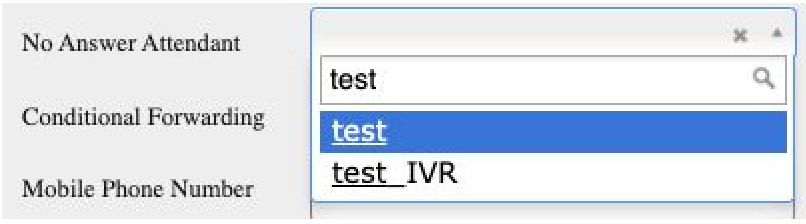
1. All of the input boxes mentioned above in the “Adding a User” section can be changed.
2. In addition to the input boxes, the following information also can be changed:
    a. Check the following box to enable the user to listen to his/her own recorded calls.



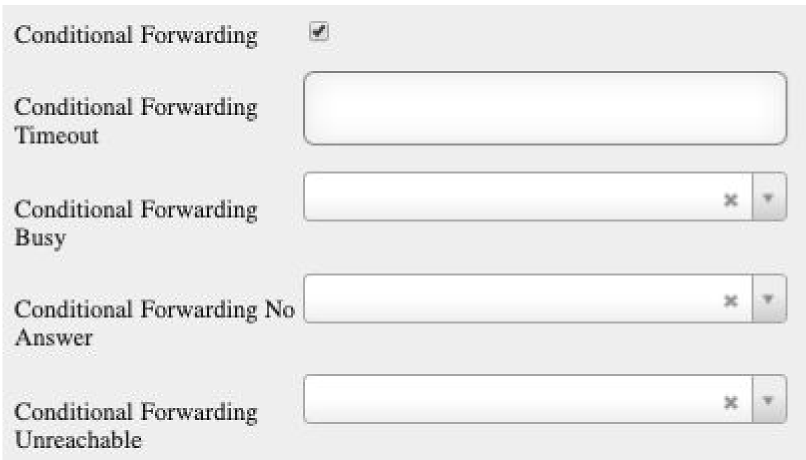
    b. Check the following box, to enable the user to view the blacklist.



c. Users can have his/her own IVR. Here it can be selected after creating a new one in the IVR section. Click the desired “No Answer Attendant” to add an IVR for no answering, from the dropdown list. If down correctly, the selection will look like the picture below.



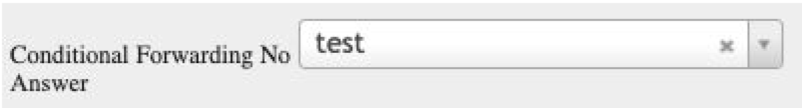
d. Click the “Station Number” input box, the following input box and dropdown lists will appear. If the user needs an IP phone and wants to use individual announcements, the conditional forwarding function can be used.



- Type the conditional forwarding timeout duration in the following input box shown below:

- Click the desired individual announcement for the “busy” situation from the dropdown list. If down correctly, the selection will look like the picture below:

- Click the desired individual announcement for the “no answer” situation from the dropdown list. If down correctly, the selection will look like the picture below:

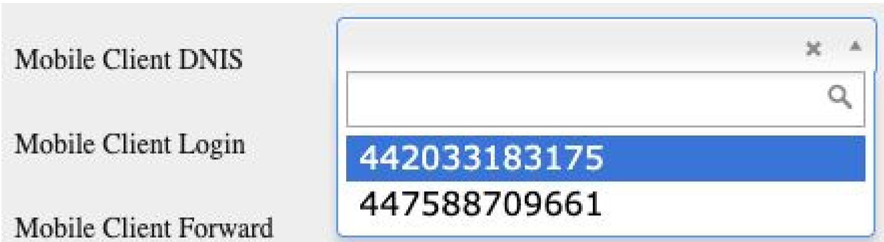


- Click the desired individual announcement for the “unreachable” situation from the dropdown list. If down correctly, the selection will look like the picture below:

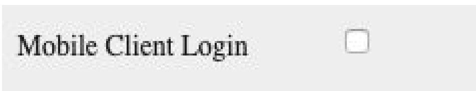
e. Click the “Station Number” input box, type the station number which is automatically given by the system to use when creating a user on an IP phone, in the layout shown below:

f. Click the "Station Password" input box, type the station number that will be used for configuration in the layout shown below:

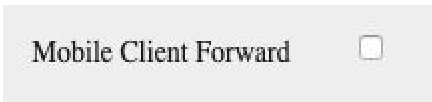
g. Click the desired "Mobile Client DNIS" to add the mobile client DNIS number from the dropdown list. If down correctly, the selection will look like the picture below:



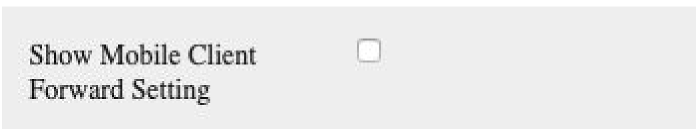
h. Check the following box, to enable the Mobile Client Login.



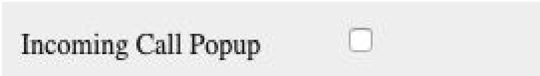
i. Check the following box, to enable the Mobile Client Forward.



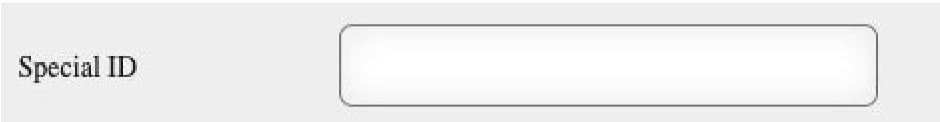
j. Check the following box to enable the user to see the mobile client forward setting.



k. Check the following box to show popups on the user's screen when the incoming call comes.



l. Click the "Special ID" input box, type the special ID of the user in the layout shown below:



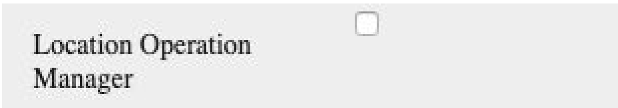
m. Check the following box to disable the supervisor from making calls.

Note: Disables supervisor from listening to agent calls. No notification will appear stating they do not have access.

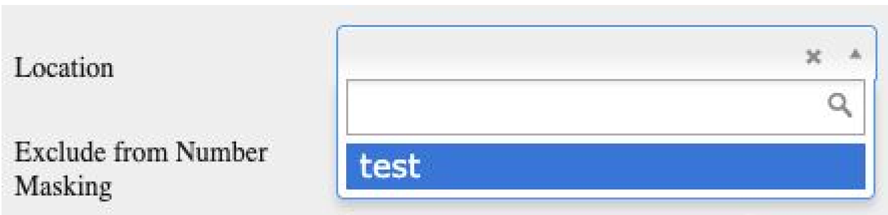
n. When the "Reject Transfer to Last User" checkbox is selected, if an IVR tree has been set up for transferring to the last user, this user will not be connected with the customer since this box is checked.

o. The Custom Field input boxes are used with third-party integrations. For more info, please contact the assigned Call Center Studio Program Manager.

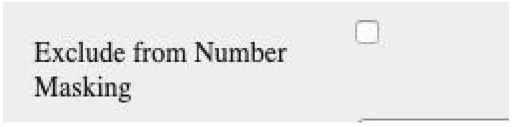
p. Check the following box to authorize the user as a location operation manager.



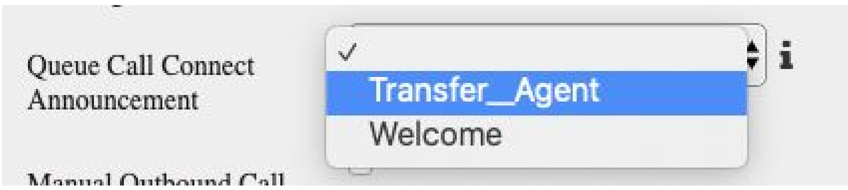
q. Click the desired “Location” to select the location operation from the dropdown list. If down correctly, the selection will look like the picture below:



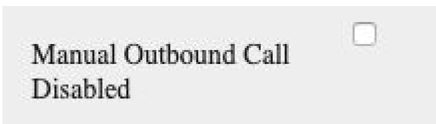
r. Check the following box to exclude a user from the Number Masking feature.



s. Select the desired announcement from the "Queue Call Connect Announcement" dropdown list. The announcement will play when the call is connected to a queue. Note: this will increase ringing status duration. Also, Queue Settings must allow agent announcements. If down correctly, the selection will look like the picture below:

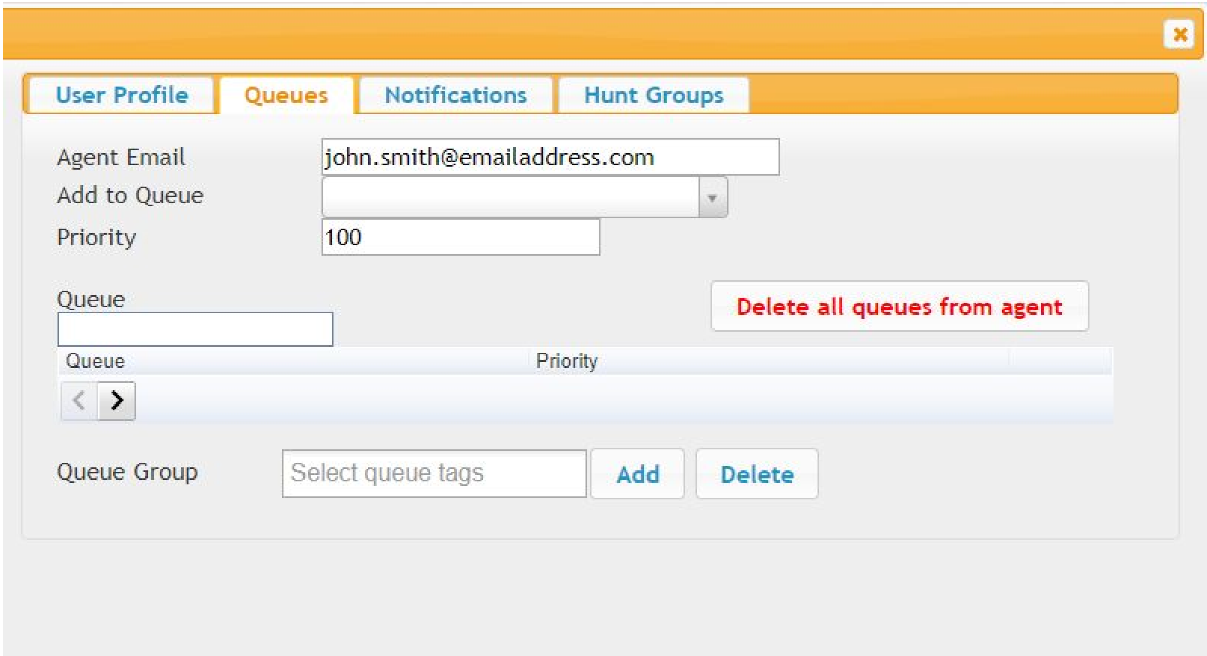


t. Check the following box to disable the user from outbound calls that can be done manually.



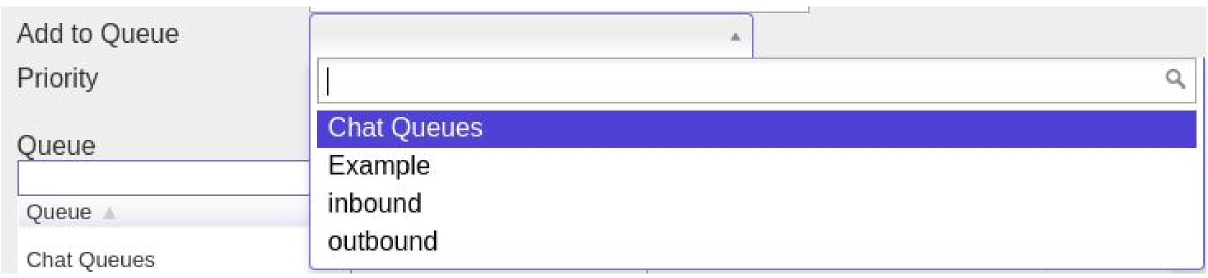
Queues Tab

This tab is used to add the desired agent/user to a defined queue. *(See **Queues** Section)*



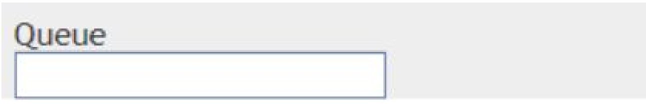
1. Since we are editing John Smith, his email address is evident in the related field.

2. As you can see underneath the Agent Email, additions can be made to the queue (Such as adding more queues to a specific user - *(See **Queues** Section)*



3. In most cases, the Priority value is defined according to the user's level of experience and knowledge. For instance, in the example below, the Priority value is set as 100 for John, meaning he will be the first one to receive an inquiry within a defined queue.

4. 'Queue' Box allows the user to type the name of a queue manually.

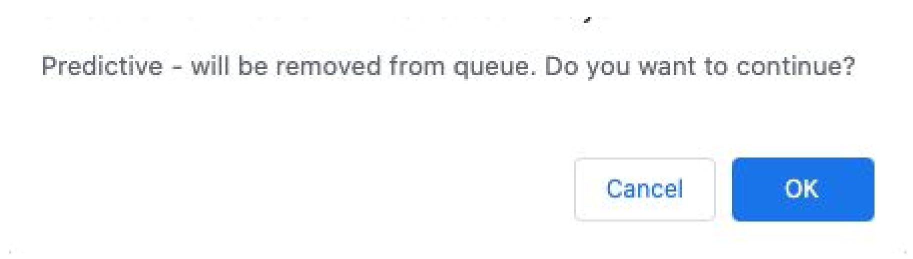


5. Delete all queues from the agent' button is located right next to it, allowing the user to pull the agent out of all the defined queues.

6. Added queues and priority levels can be seen here.

Delete a Queue

1. To delete queues from the user, click the delete button . When the delete button is clicked, the following pop-up will appear, an example is shown below:



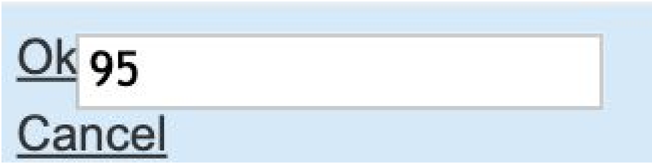
- *Select the cancel button, , to cancel the deletion.*
- *Select the OK button, , to confirm the deletion.*

2. Confirm the deletion by clicking the OK button, .

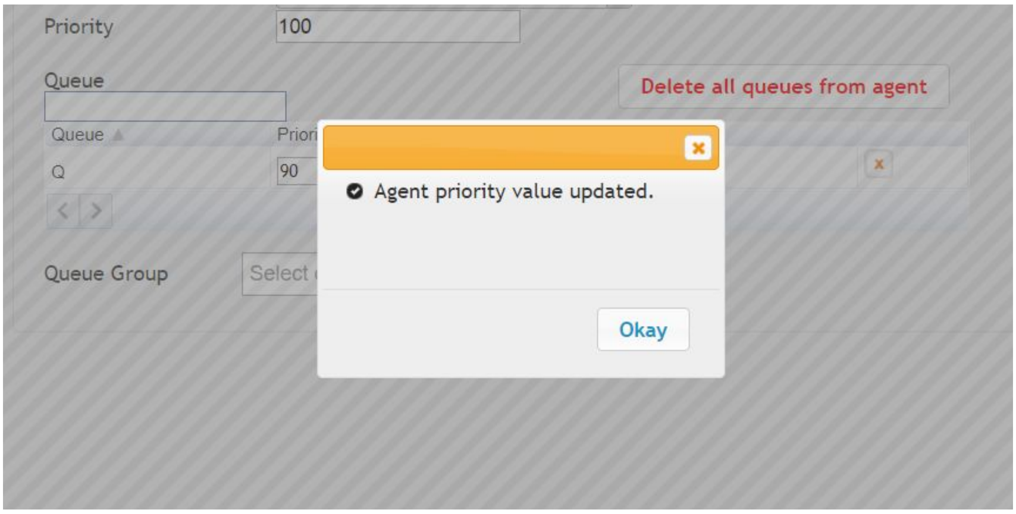
The screen will reload, and the deleted queue will not be shown.

Changing the Priority level

1. Click the input box shown in the priority column and type the preferred priority level as described in the adding a user section.



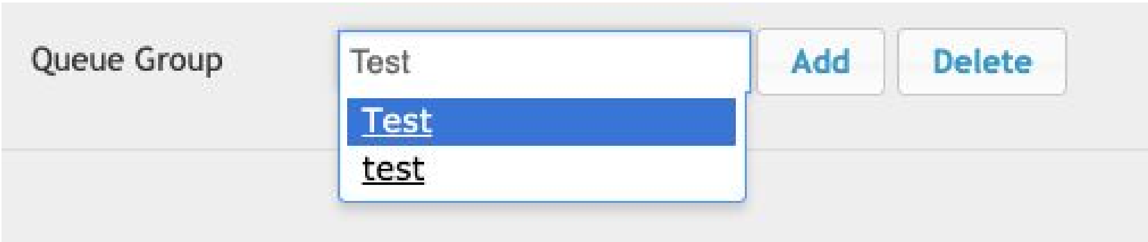
2. Click the Ok button,  , to acknowledge the additions and to update the priority value.



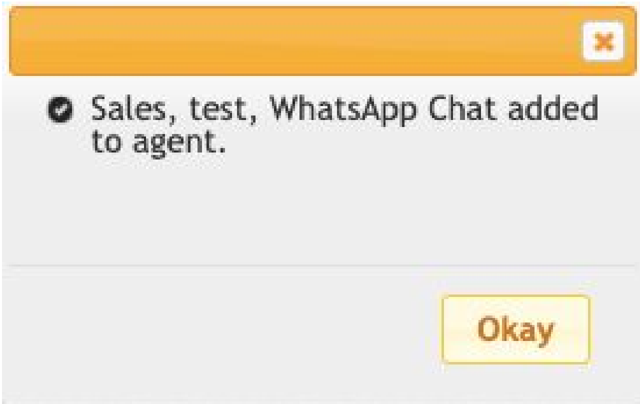
3. Click the cancel button, , to cancel the change.

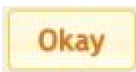
Adding Queue Group

1. Click the desired “Queue group” to add a new queue group to the user, from the dropdown list,

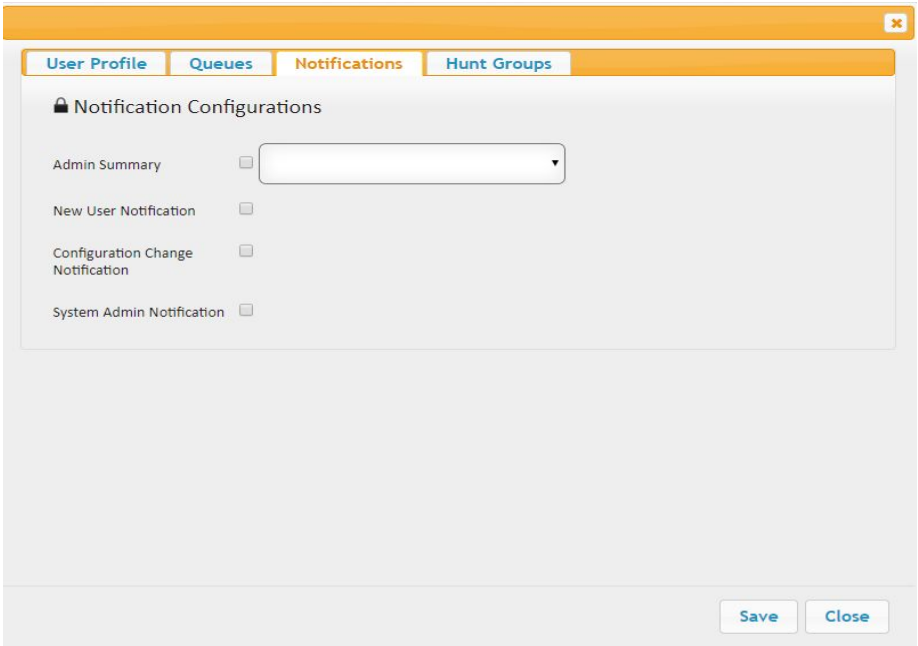


2. Once the queue group is selected, click the Add button,  . When the add button is clicked, the following pop-up will appear:



3. Selecting the Okay button,  , will confirm the addition.

Notifications Tab

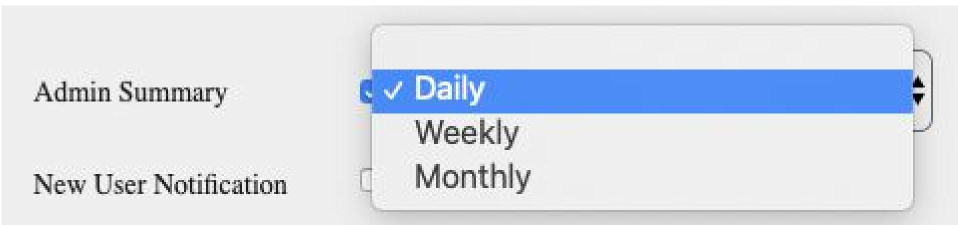


Notification Configurations

1. Administrator Summary Report Check Box:

Data can be gathered Daily, Weekly, and Monthly, according to the user's preference.

A summary report is sent via email to the defined email address.

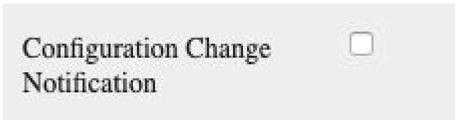


2. New User Notification Check Box:

A notification email is sent to inform that a new user is created.

3. Configuration Change Notification Check Box:

When the following checkbox is selected, if a queue is changed, details regarding the change will be sent to the user.

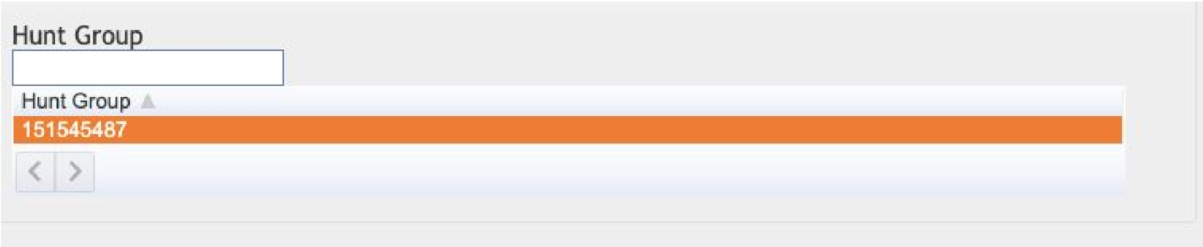


4. System Admin Notification Check Box:

The “System Admin Notification” checkbox is used to notify the admin of changes to the tenant.

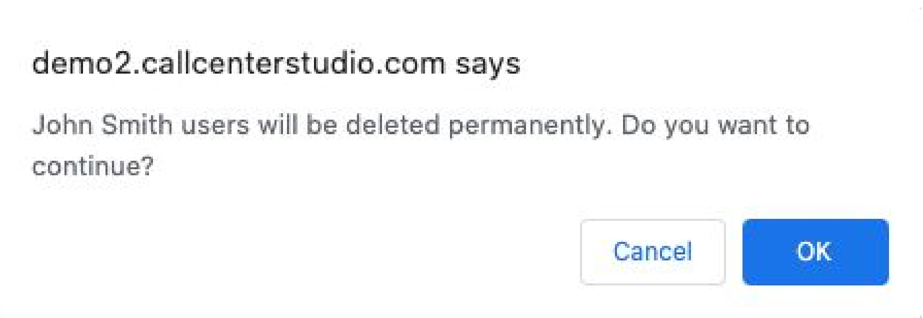
Hunt Groups Tab

1. Simply allows the user to choose a Hunt Group. (*See* ***Hunt Groups*** *for a detailed explanation*)



Deleting a Users

1. From the "Users" main page, click the delete button, , to the right of the edit button, , to remove a user. When the delete button is clicked, the following pop-up will appear:



- *Select the cancel button,* 

, to cancel the deletion.
- *Selecting the OK button,* 

, to confirm the deletion.

2. Confirm the deletion by clicking the OK button, 

.

- *The screen will reload, and the deleted user will not be shown.*

Searching for a User

There are four ways to search for a user.

- *Username*
- *Name*
- *Station Number*
- *Extension Number*

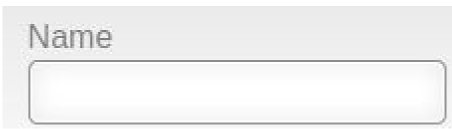
Username

1. Click the “Username” input box, type the desired Username. The input box is shown below:

Note: Partial names can be used when spelled correctly.

Name

1. Click the “Name” input box, type the desired name. The input box is shown below:



Note: Partial names can be used when spelled correctly.

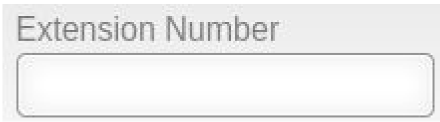
Station Number

1. Click the "Station Number" input box, type the desired station number. The input box is shown below:

Note: Partial names can be used when spelled correctly.

Extension Number

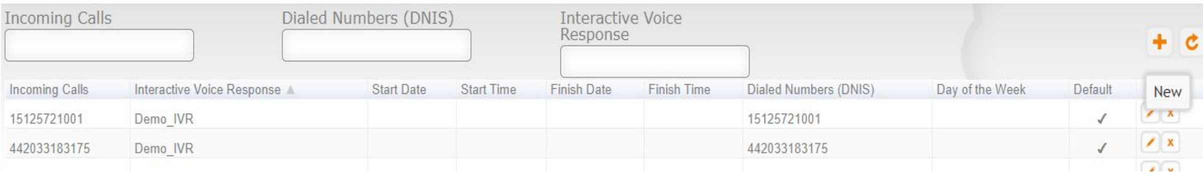
1. Click the "Extension Number" input box, type the desired extension number. The input box is shown below:



Note: Partial names can be used when spelled correctly.

Incoming Calls

Interactive Voice Responses (IVRs) registered in the system are displayed and routed to the appropriate number. (*See the **Attendants** section for additional information about IVRs*). Here IVR rules can be sent instead of creating working hour constraints within the IVR itself.

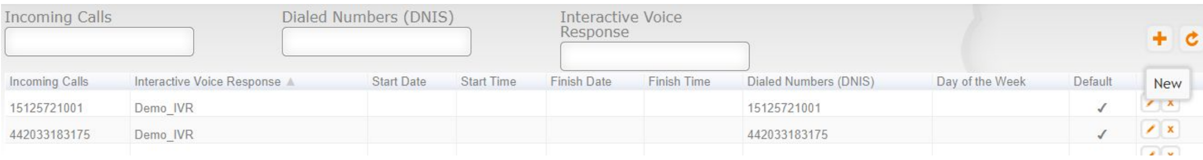


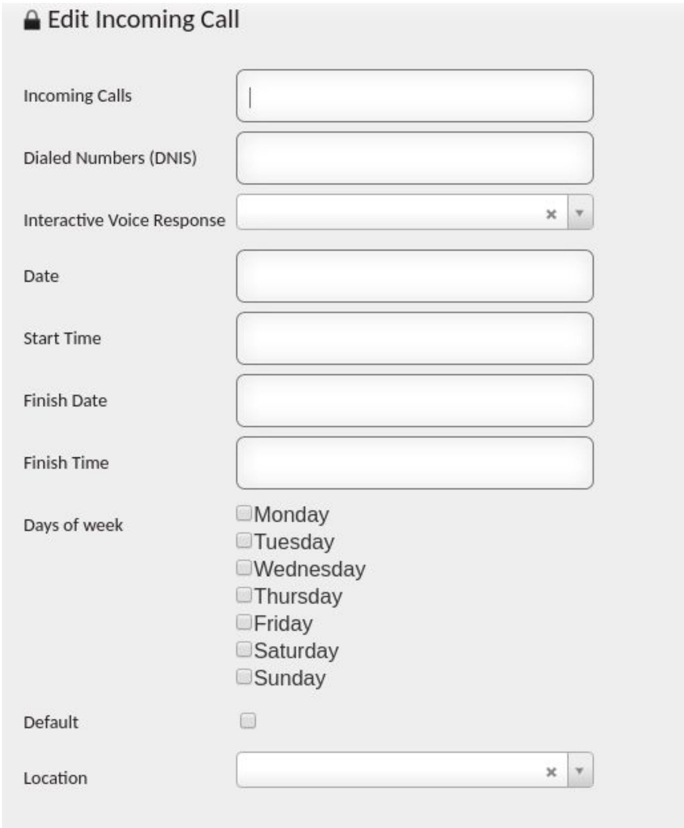
Incoming Calls	Interactive Voice Response	Start Date	Start Time	Finish Date	Finish Time	Dialed Numbers (DNIS)	Day of the Week	Default
15125721001	Demo_IVR					15125721001		✓
442033183175	Demo_IVR					442033183175		✓

To update a defined Inbound Call, users must click the edit button, . Both buttons (add & edit) results in the pop-up of the same window, which is indicated below:

Adding an Incoming Call

1. Click the add button, ✚ , located at the top right of the page.

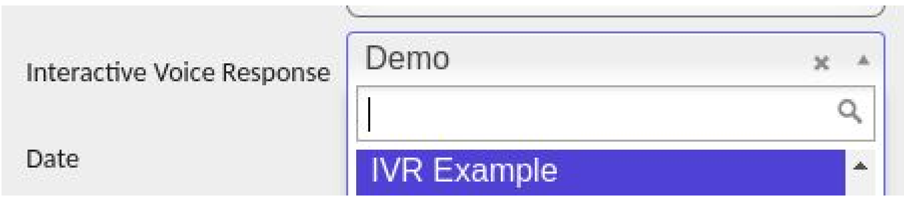




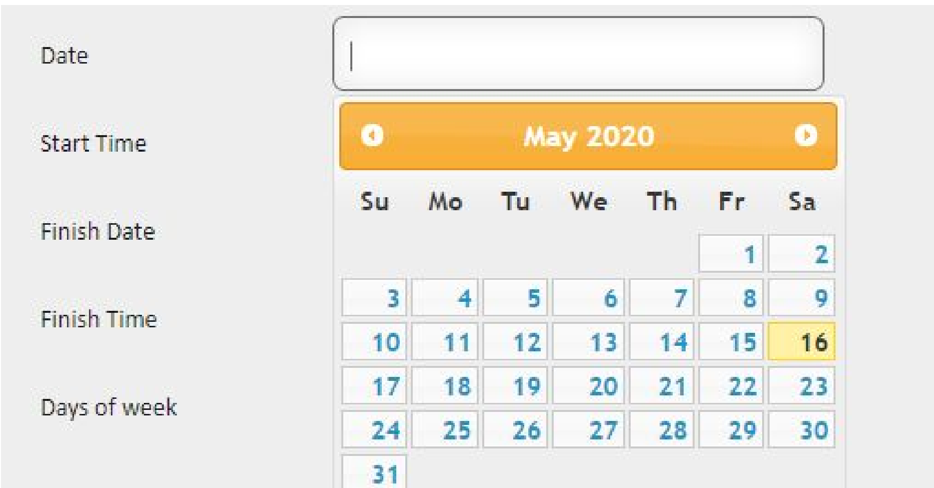
2. **Incoming Calls**: Click the "Incoming Calls input box, type the desired name - an example is shown below:

3. **Dialed Number (DNIS)**: A phone number that is used to reply to calls. Click the "Dialed Number (DNIS) input box, type the desired number - an example is shown below:

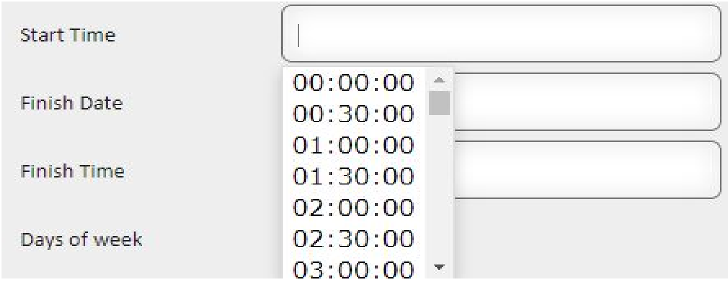
4. **Interactive Voice Response**: A welcome menu (IVR) previously defined in the system is selected here. Click the "Interactive Voice Response box, and choose the desired IVR - an example is shown below: (*See* ***Attendants*** *section for additional information about IVRs*)



5. **Date**: Used to route to different welcome menus within a defined period. Select the desired day.

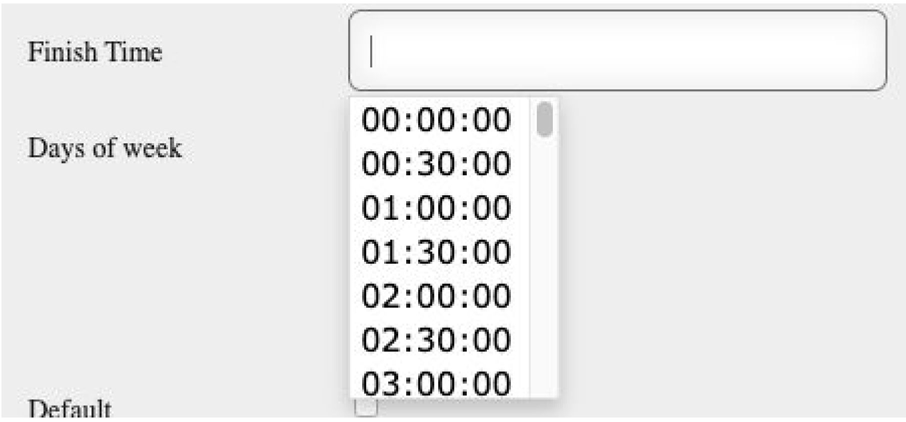


6. **Start Time**: Denotes the starting period using half-hour increments.



7. **Finish Date**: Termination date of the desired incoming call rule.

8. **Finish Time**: Denotes ending period in half-hour increments.



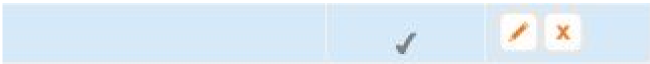
9. **Days of Week**: Used for regular operations on selected days of the week. For instance, if Monday-Wednesday-Friday were selected, that specific call would be routed to the defined IVR on those days.

10. **Default**: Can be used when no particular date, hour, and days of week criteria are determined. (Only one default can be used per IVR, multiple incoming calls rules can be set up per IVR,).

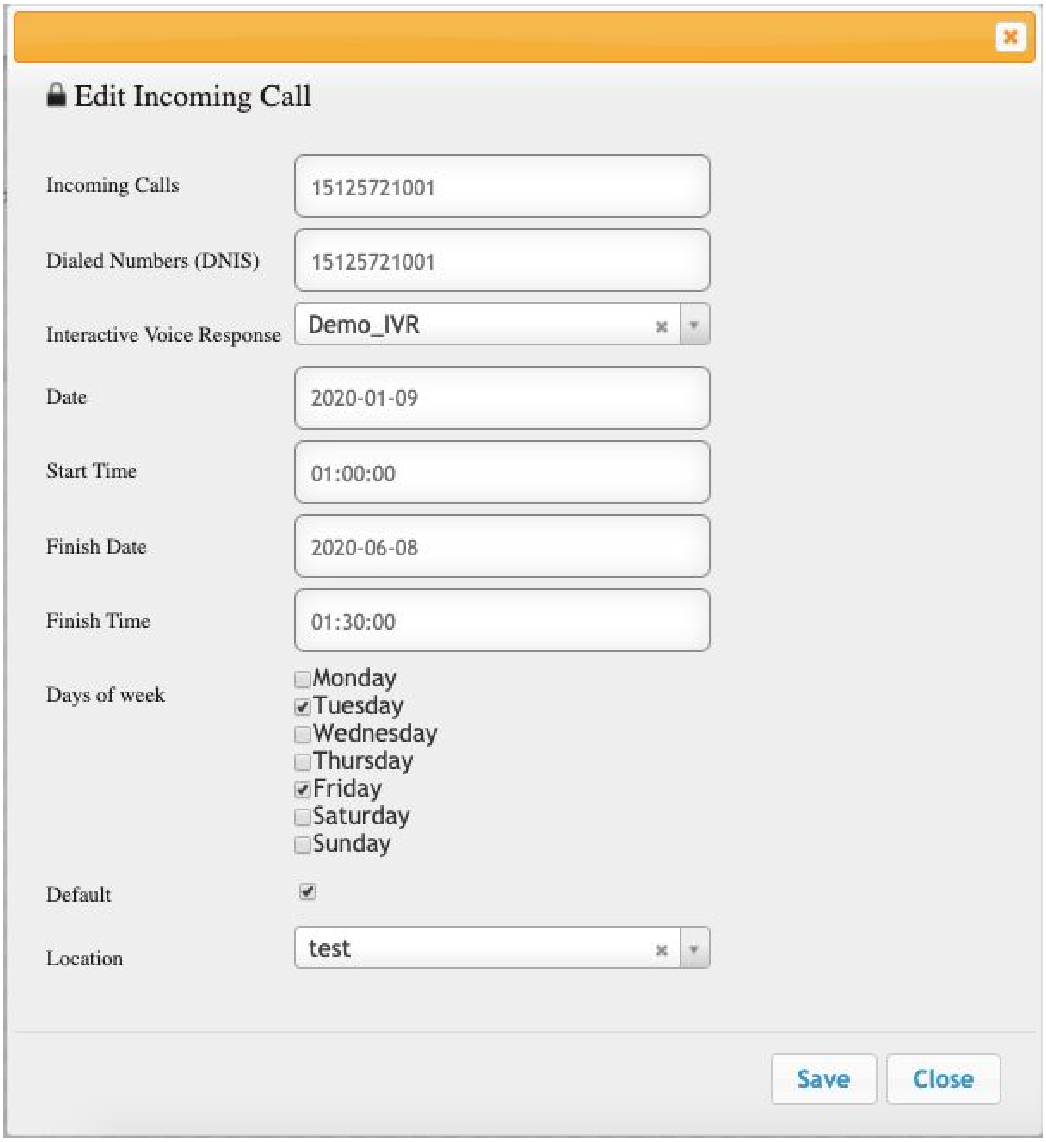
11. **Location**: Used to separate different dial plans according to defined locations. (*See the* ***Location*** *section for additional information about this part*).

Editing an Incoming Call

1. To edit a defined incoming call, click the edit button, , located on the far right of the row as shown below:

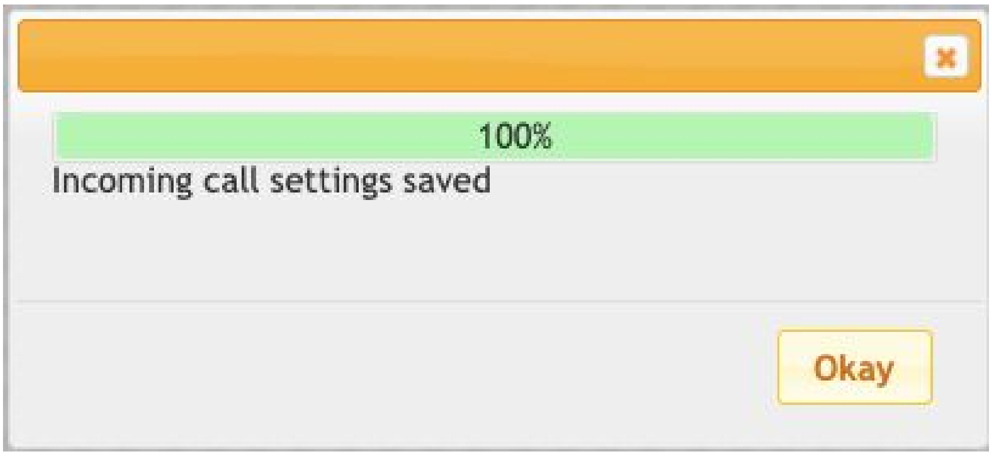


2. After clicking the edit button, the incoming call pop-up window will appear as shown.



3. Make the change as desired.

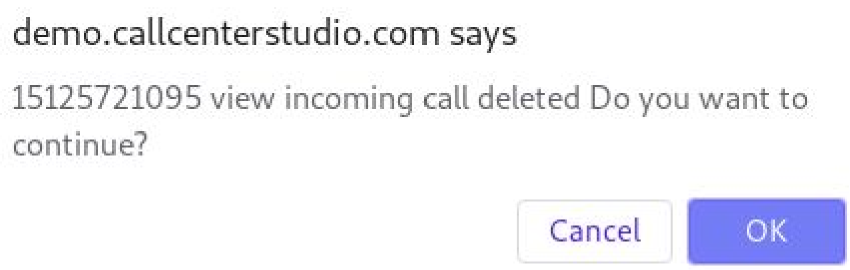
4. Once the desired changes have been completed, the information can be saved by clicking the save button, Save, the following pop-up box will appear:



5. Click the Okay button, Okay, to confirm the changes.

Deleting a Defined Inbound Call

1. From the Incoming Calls main page, click the delete button, , to the right of the edit button, , to remove an incoming call. When the delete button is clicked, the following pop-up will appear:

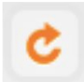


- *Select the cancel button, Cancel , to cancel the deletion.*
- *Select the OK button, OK, to confirm the deletion.*

2. Confirm the deletion by clicking the OK button, OK.

- *The screen will reload, and the deleted user will not be shown.*

Refreshing the Incoming Calls Page

To refreshing the page, click the refresh button,  .

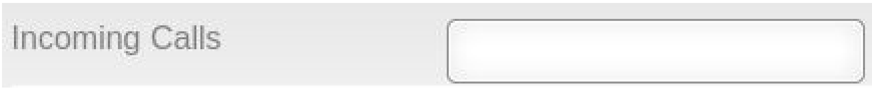
Searching for an Incoming Call

There are three ways to search for an incoming call.

- Incoming Calls
- Dialed Numbers (DNIS)
- Interactive Voice Response

Incoming Calls

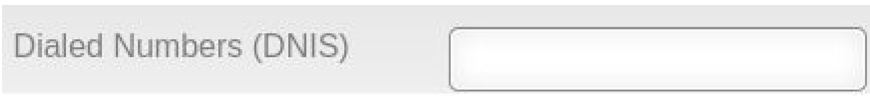
1. Click the "Incoming Calls" input box, type the desired Incoming Call's name. The input box is shown below:



Note: Partial names can be used when spelled correctly.

Dialed Numbers (DNIS)

1. Click the "Dialed Numbers (DNIS)" input box, type the number of the incoming call (DNIS). The input box is shown below:



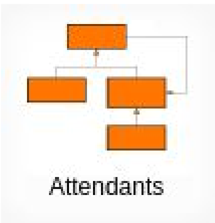
Note: Partial names can be used when spelled correctly.

Interactive Voice Response

1. Click the "Interactive Voice Response" input box, type the name of the desired IVR. The input box is shown below:

Note: Partial names can be used when spelled correctly.

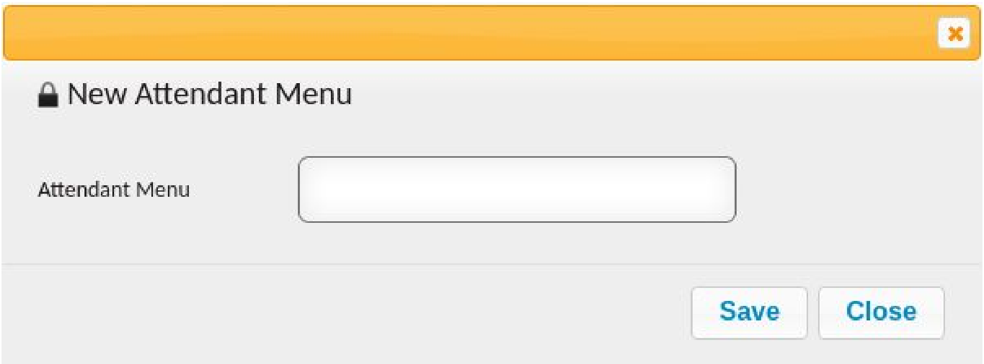
Attendants



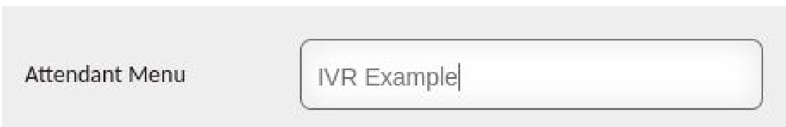
The Attendants screen is where Interactive Voice Response (IVR) trees can be constructed and managed.

Creating an IVR

1. Click the new button, , in the top right corner, the following pop-up screen will appear as shown below:

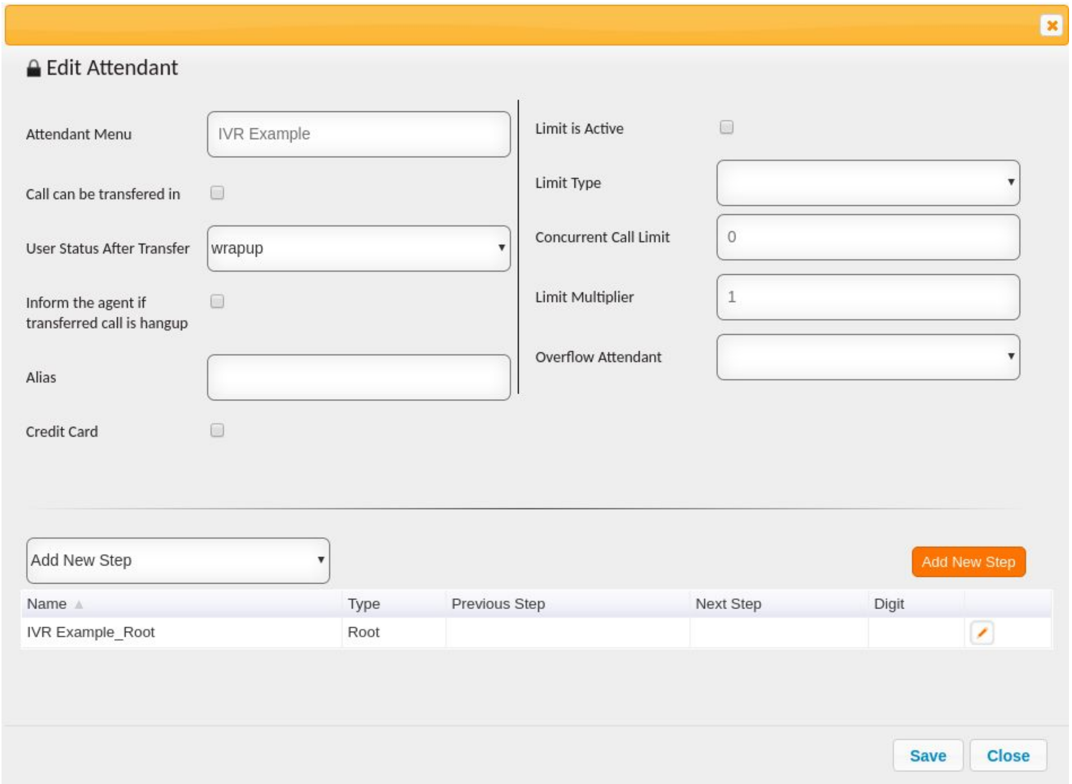


2. Click the Attendant Menu input box, type the desired name of the IVR an example name is shown below:



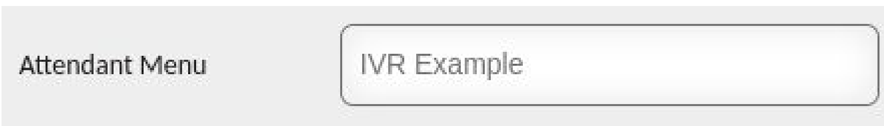
3. Click the save button, 

, the following screen will appear:



Note: By Default, several things are already set up within the IVR. They are listed below:

The Attendant Menu name is inputted by default, as shown below:



User Status After Transfer is wrapup (allows for a delay, the agent has to reselect the Available status to resume receiving calls) by default, as shown below:

Limit Multiplier is "1" by default (used as a multiplying factor for the "auto based" calculations. For example, if the auto-based calculation determines there are "6" agents, the limit multiplier is the number that is multiplied by the auto based agent count. So for this example, using a limit multiplier of "1" the total number of inbound calls that can be handle by the IVR before going to the overflow attendant is "6") as shown below:

Limit Multiplier	1

The root step of the IVR tree is displayed in the following format:

"Name assigned to the Attendant"_Root *as shown below:*

Name	Type	Previous Step	Next Step	Digit	
IVR Example_Root	Root				

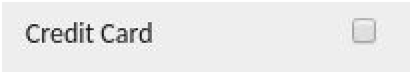
4. If desired, select the "Calls can be transferred in" checkbox (this allows the agent to transfer to this IVR if desired). The checkbox is shown below:

   Call can be transfered in ☐

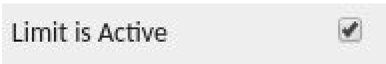
5. If desired, select the "Inform the agent if a transferred call is hangup" checkbox (If this checkbox is selected, it will notify the agent if the customer hung up the call before completing the IVR. For example, if the agent transferred the customer to a satisfaction survey, and the customer hung up before completing the survey. The checkbox is shown below:

   Inform the agent if transferred call is hangup ☐

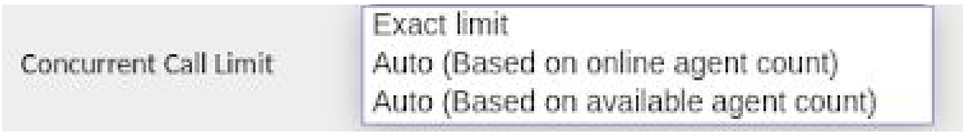
6. If desired, an Alias number can be used for the IVR. (Normally used for IP phones so the agent can transfer to an IVR set up for IP phones, but it can also be used in the tenant, by selecting "Internal Transfer" in the Queues section - See more in the queues section)
7. If desired, the credit card checkbox can be selected (Must be checked when creating an IVR credit card payment step). The checkbox is shown below:



8. IVR call limits can be set up by selecting the "Limit is Active" checkbox, as shown below:



9. Click the "Limit Type" input box. The following dropdown menu will appear:



The dropdown selections are described below:

Exact Limit	If Exact Limit is selected, please follow steps 10 - 11 to input the exact limit.
Auto (Based on online agent count)	Determines the number of concurrent calls to the IVR based on the online agent count (agent can be in any status) Skip steps 10 - 11.
Auto (Based on available agent count)	Determines the number of concurrent calls to the IVR based on the online available agent count. Skip steps 10 - 11.

10. Click the "Concurrent Call Limit" input box type the desired concurrent call limit. An example is shown below:

11. Click the “Limit Multiplier” input box, type the desired limit multiplier (Can only be used for “Auto (Based on online agent count)” and “Auto (Based on available agent count)”:

Note: Limit Multiplier is “1” by default (used as a multiplying factor for the “auto based” calculations. For example, if the auto-based calculation determines there are “6” agents, the limit multiplier is the number that is multiplied by the auto based agent count. So for this example, using a limit multiplier of “1” the total number of inbound calls that can be handle by the IVR before going to the overflow attendant is “6”) as shown below:

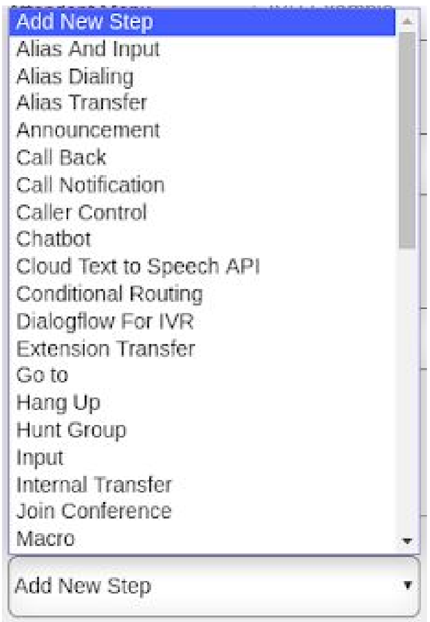
12. If the Limit is Active checkbox is selected, the “Overflow Attendant” input box must be defined. Click the input box a dropdown list of created IVR’s will be displayed (If no IVR’s are displayed, deselect the “Limit is Active” checkbox, finish following these steps, and create a secondary IVR to be used as the overflow attendant, then edit this IVR and select the “Limit is Active" checkbox and the appropriate IVR.

Adding Alias And Input Step

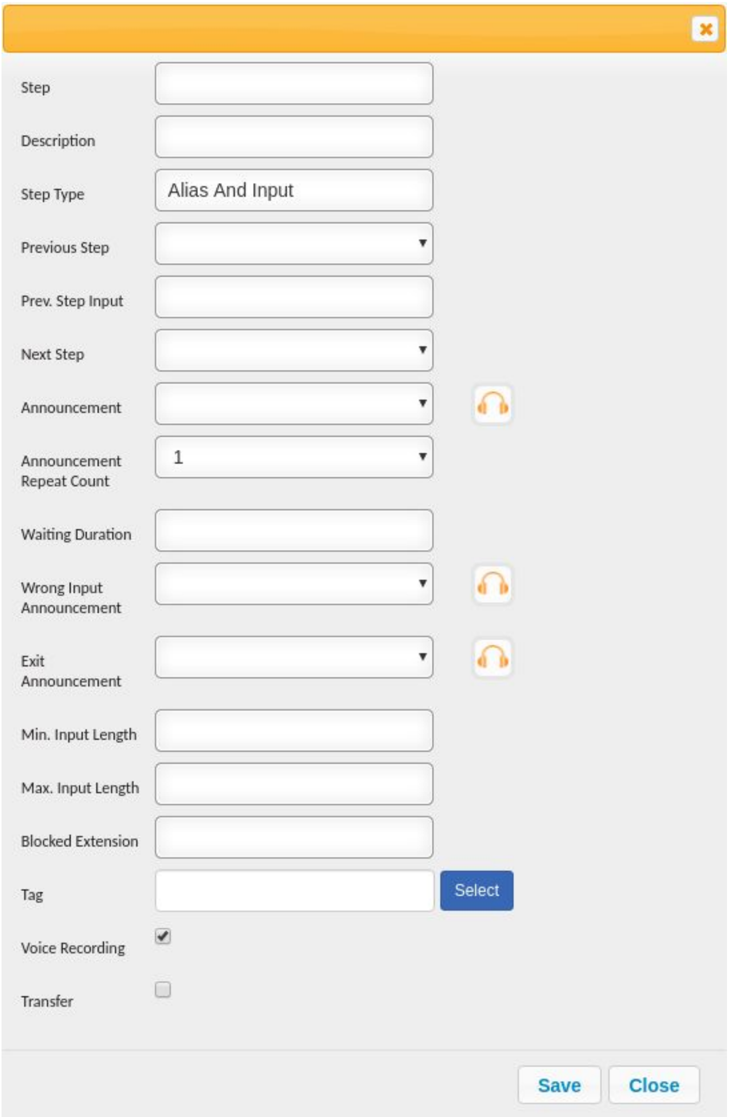
For example, when Alias and İnput are added to IVR, The caller will hear an announcement saying, "dial if you know the extension number.” If the caller wants to talk to Agent 1 specifically, the caller dials 1001, and the call is forwarded to Agent 1.

1. Click the “Add New Step” dropdown box, 

, the following list will appear:



2. Select the “Alias And Input” step the following pop-up window will appear:



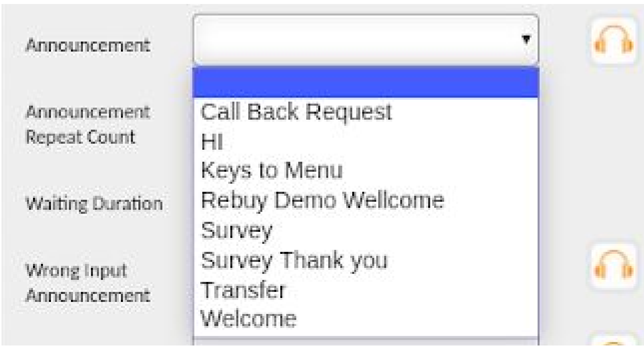
3. Click the “Step” input box, type the desired step name. An example is shown below:

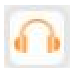
4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.

6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).

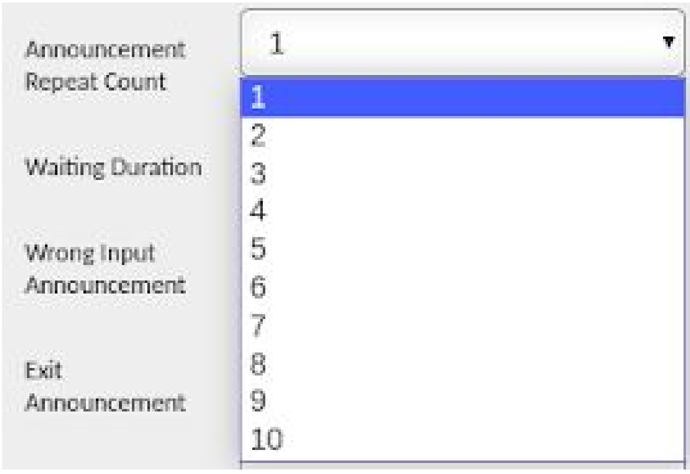
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.

8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:



Note: Announcements can be listened to by clicking the following button,  *, located to the right of each Announcement dropdown list.*

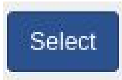
9. Click the "Announcement Repeat Count" input box the following dropdown list will appear:



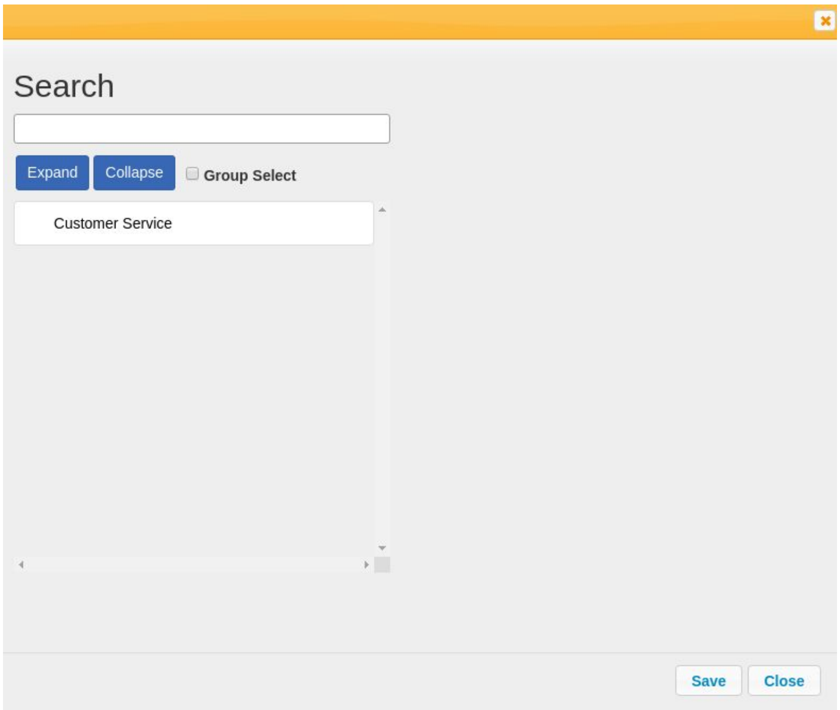
10. Select the desired repeat count.
11. In the "Waiting Duration" input box type the waiting duration for the customer input (Seconds) an example is shown below:

12. Click the "Wrong Input Announcement" input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.
13. Click the "Exit Announcement" input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.
14. Click the "Min. Input Length" input box type the minimum input length, always "1."
15. Click the "Max. Input Length" input box type the maximum input length for the customer to select. For example, if the Alias's range between 3 digits and 4 digits, the max. The input length will be 4.

16. Select the "Blocked Extension" input box type the desired blocked extension. It can be inputted to prevent the customer from being transferred to this value (commas can be used to add multiple extensions).

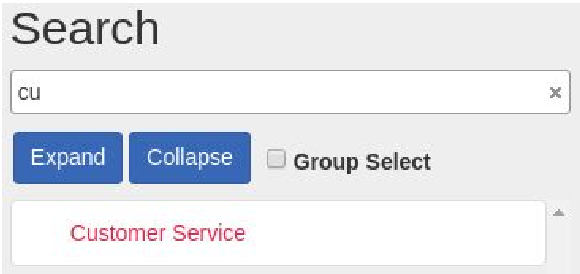
17. If a tag is desired, click the Select button, 

to the right of the "Tag" input box, the following pop-up window will appear:



18. Search for a Tag using the “Search” input box shown below:

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



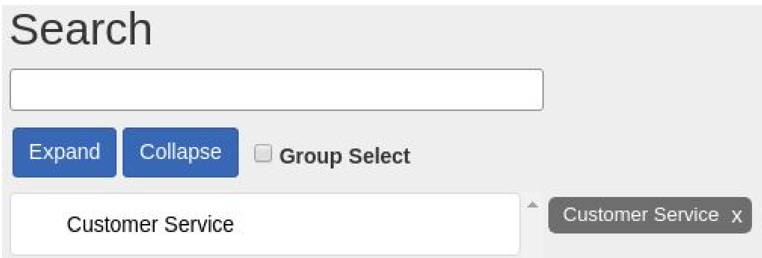
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

Check the Group Select Checkbox, Group Select*, to group select tags.*

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the “X,” X*, to the right of the tag name.*

19. Below the tag's input box, the following two checkboxes are displayed:

The descriptions of these checkboxes are explained below:

Voice Recording	If checked, records the IVR
Transfer	Used by the Call Center Studio Development Team (Do not check)

20. Click the save button, 

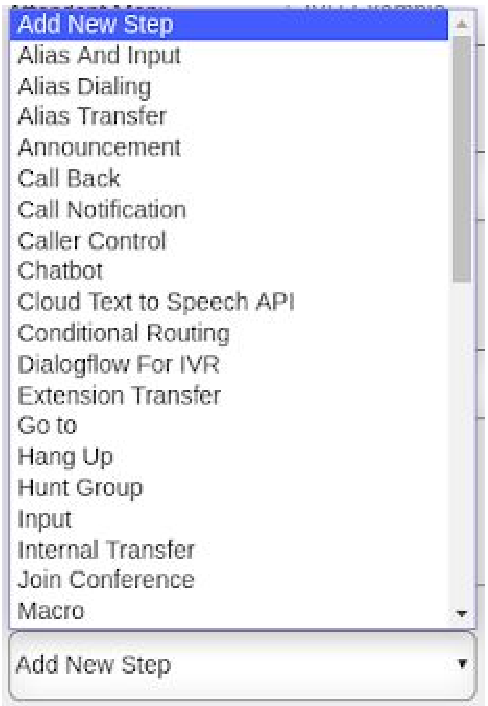
.

<u>Adding Alias Dialing Step</u>

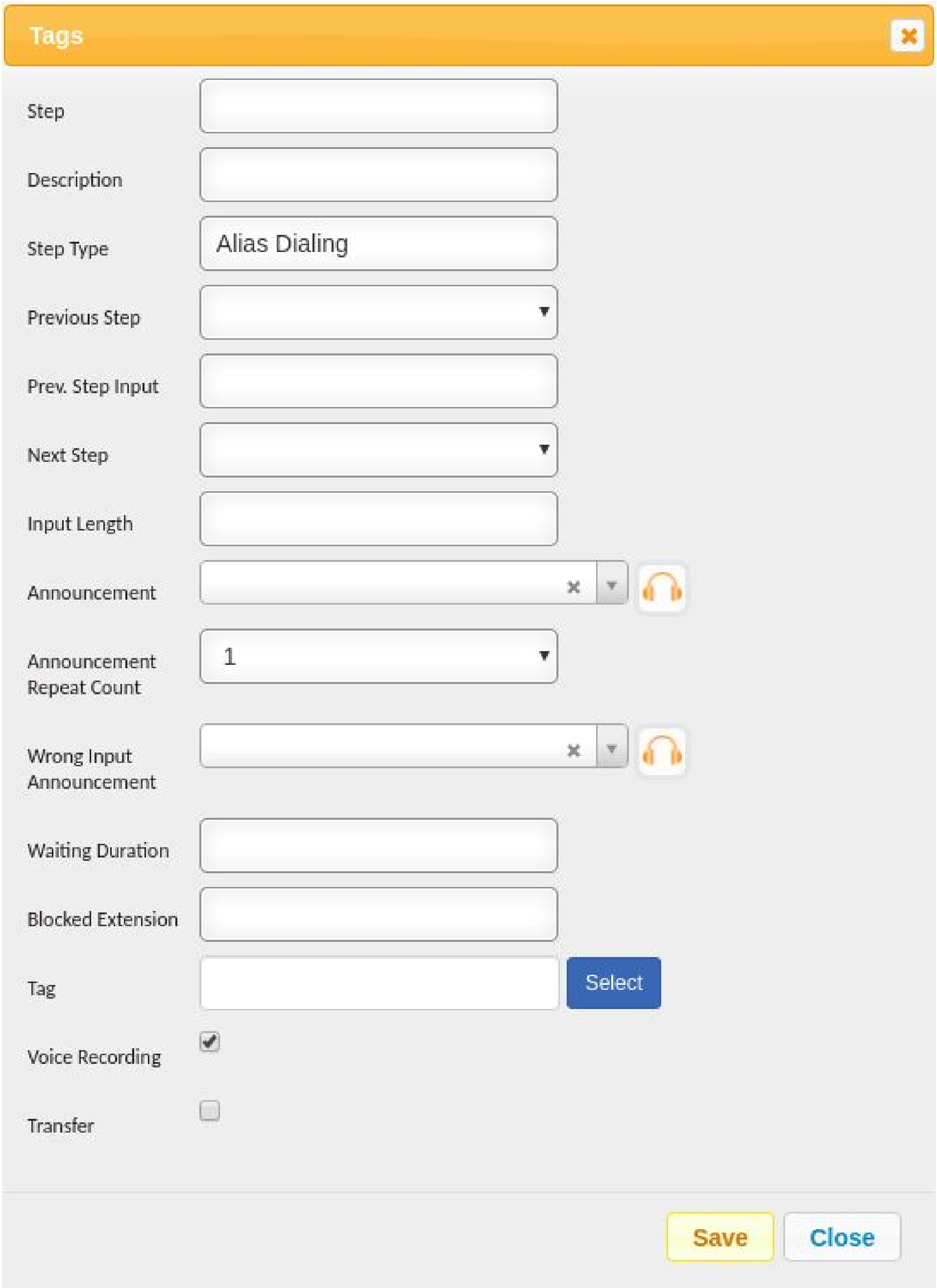
The step is used to transfer the call to the dialed extension number.

1. Click the “Add New Step” dropdown box, 

, the following list will appear:

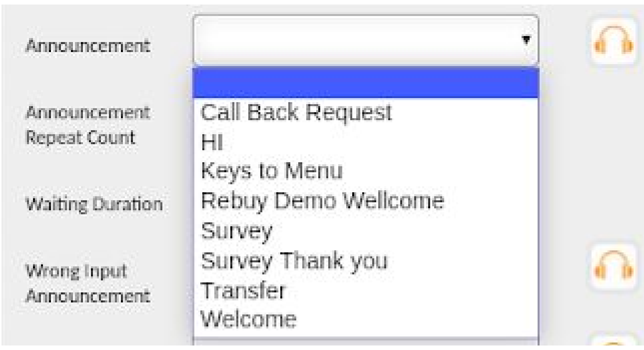


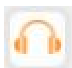
2. Select the “Alias Dialing” step the following pop-up window will appear:



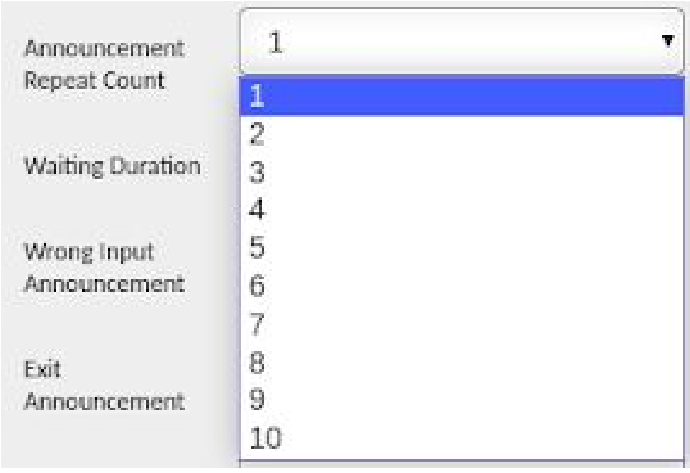
3. Click the “Step” input box, type the desired step name. An example is shown below:

4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Input Length” input box, type the desired input length.
9. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:



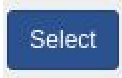
Note: Announcements can be listened to by clicking the following button,  *, located to the right of each Announcement dropdown list.*

10. Click the “Announcement Repeat Count” input box, the following dropdown list will appear:

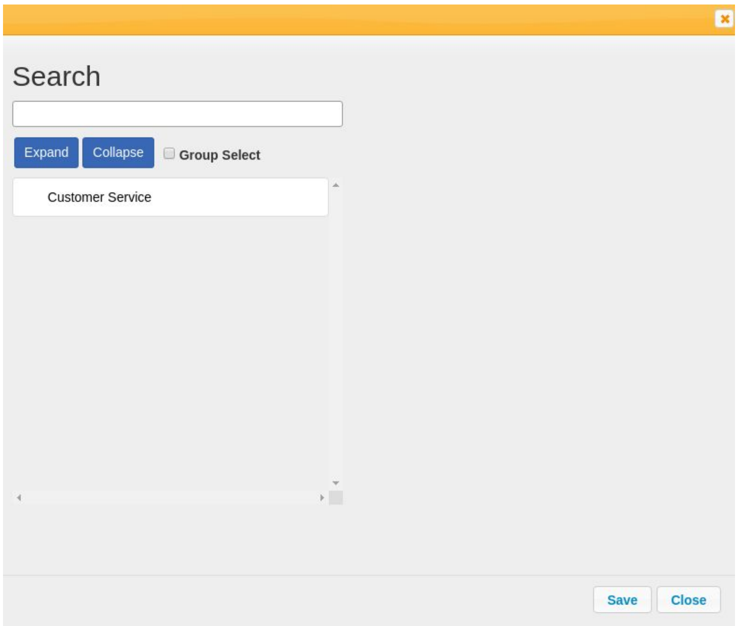


11. Click the “Wrong Input Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.
12. In the “Waiting Duration” input type the waiting duration for customer input (Seconds) an example is shown below:

13. Select the “Blocked Extension” input box type the desired blocked extension. It can be inputted to prevent the customer from being transferred to this value (commas can be used to add multiple extensions).

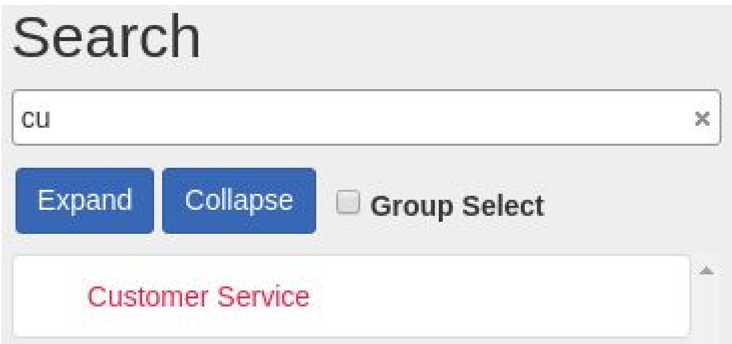
14. If a tag is desired, click the Select button, 

to the right of the "Tag" input box, the following pop-up window will appear:



15. Search for a Tag using the "Search" input box shown below:

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



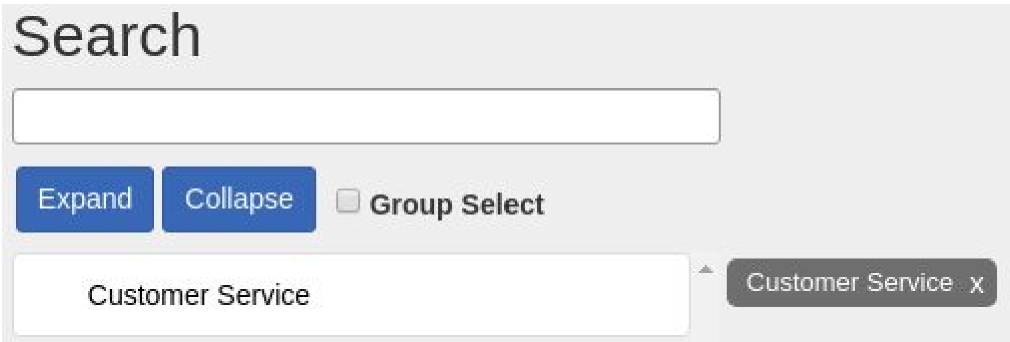
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

Check the Group Select Checkbox, Group Select *, to group select tags.*

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the "X," x*, to the right of the tag name.*

16. Below the tag's input box, the following two checkboxes are displayed:

The descriptions of these checkboxes are explained below:

Voice Recording	If checked, records the IVR
Transfer	Used by the Call Center Studio Development Team (Do not check)

17. Click the save button, 

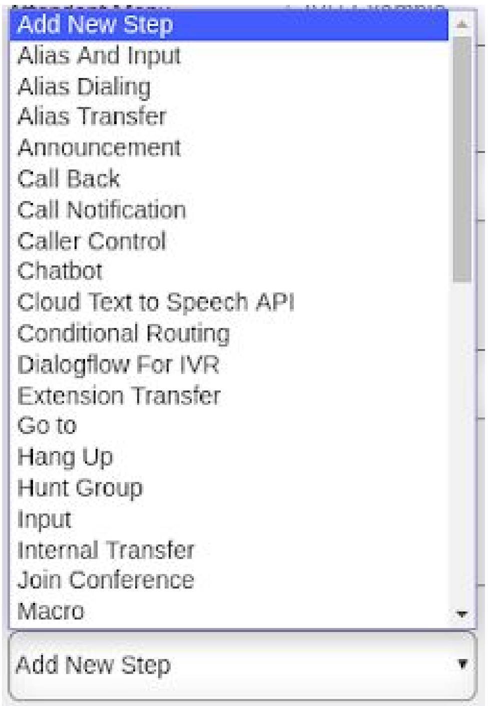
.

Adding Alias Transfer Step

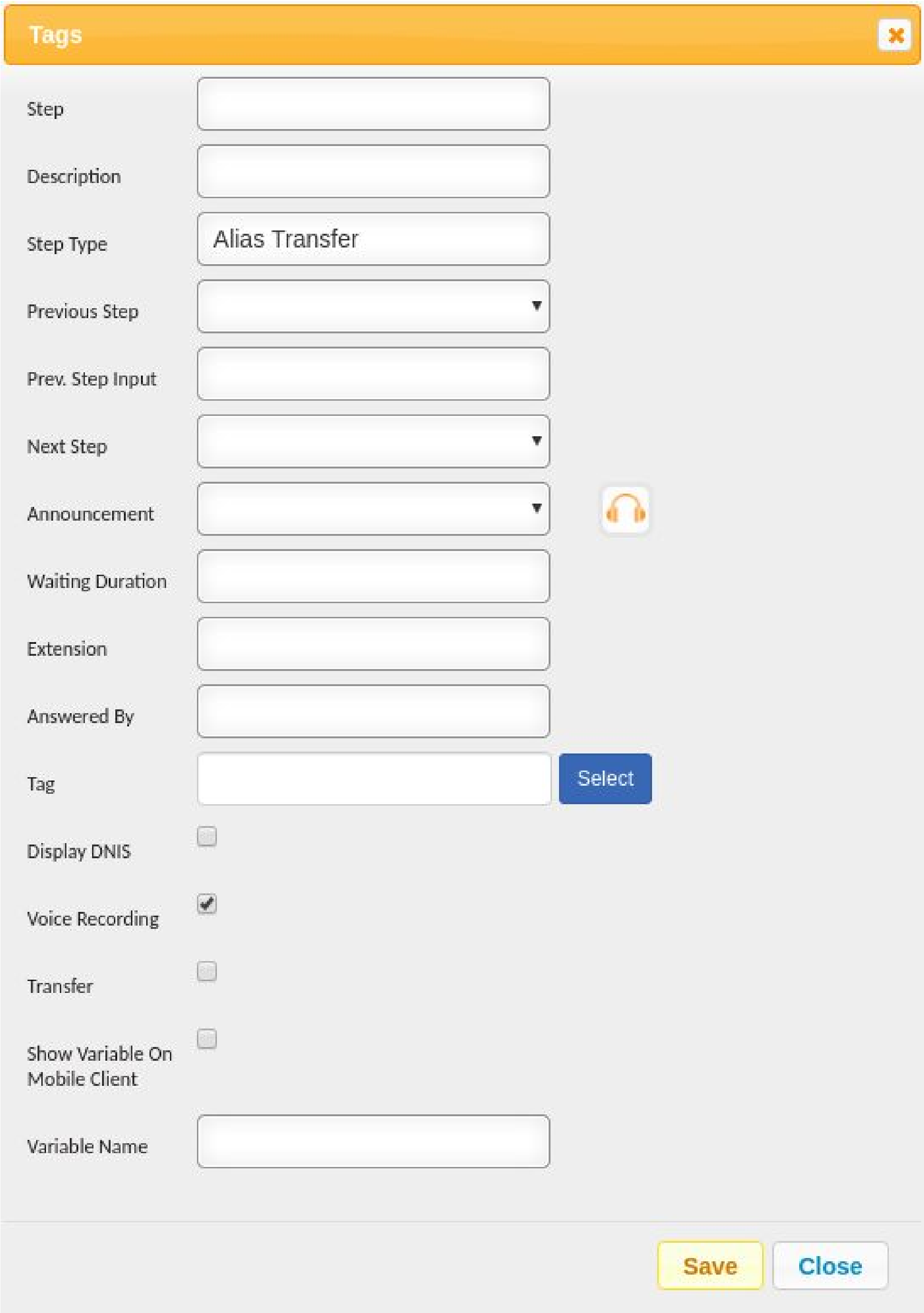
The step used to transfer the call to the designated IP phone.

1. Click the "Add New Step" dropdown box, 

, the following list will appear:

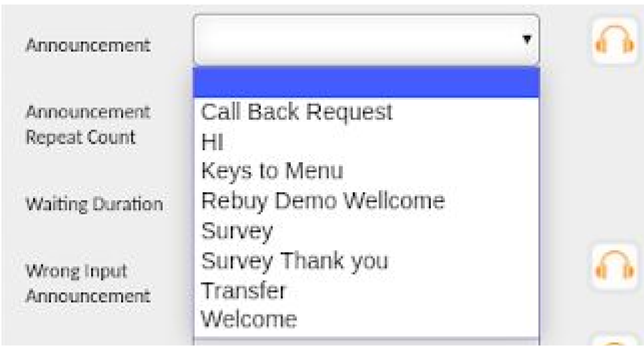


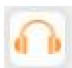
2. Select the “Alias Transfer” step the following pop-up window will appear:



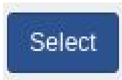
3. Click the “Step” input box, type the desired step name. An example is shown below:

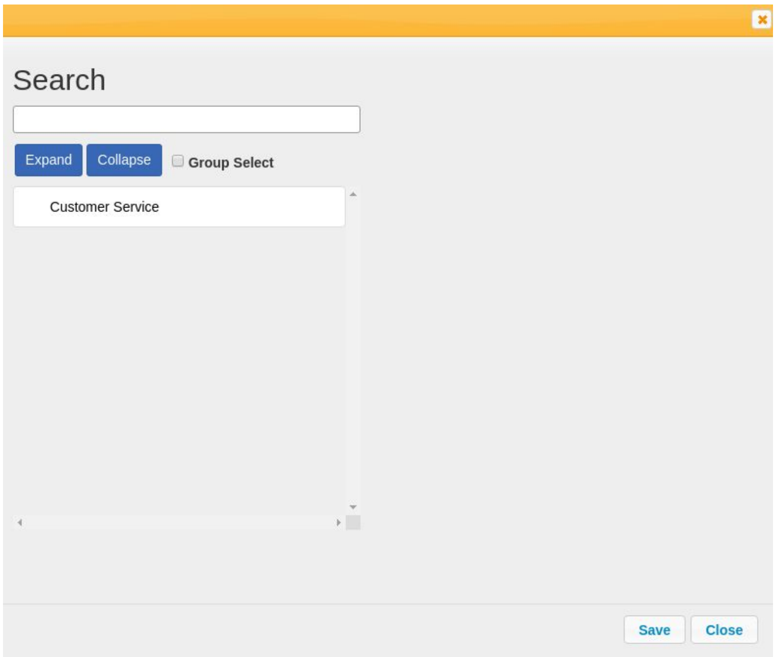
4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:



Note: Announcements can be listened to by clicking the following button,  *, located to the right of each Announcement dropdown list.*

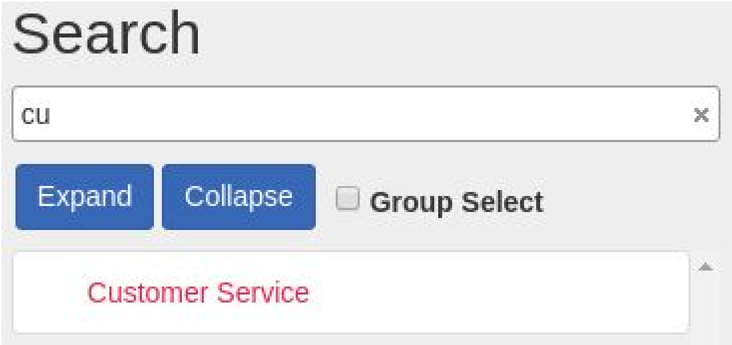
9. In the “Waiting Duration” input type the waiting duration for the customer input (Seconds) an example is shown below:

10. In the “Extension” input box type, the desired user’s extension.
11. In the “Answered By,” input box type the desired user’s name.
12. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:



13. Search for a Tag using the “Search” input box shown below:

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



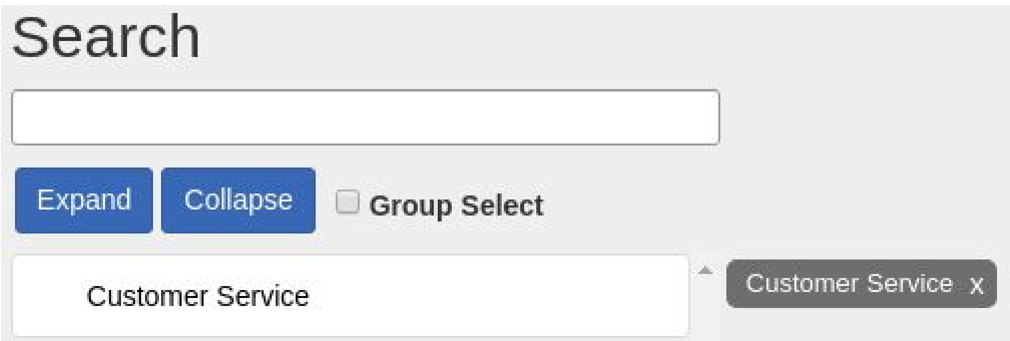
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

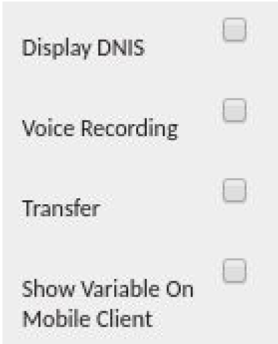
Check the Group Select Checkbox, Group Select *, to group select tags.*

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the "X," X*, to the right of the tag name*

14. Below the tag's input box, the following four checkboxes are displayed:



The descriptions of these checkboxes are explained below:

Display DNIS	When clicked shows the agent’s number, not customers. It is used to mask the customer’s number.
Voice Recording	If checked, it allows the customer’s voice to be recorded.
Transfer	Used by the Call Center Studio Development Team (Do not check)
Show Variable on Mobile Client	If employees are using the Call Center Studio mobile client, this checkbox can be displayed, so the employee knows that the call is coming from the IVR.

15. If the Show Variable on Mobile Client checkbox is selected, click the "Variable Name" input box and type the desired variable name. If employees are using the Call Center Studio mobile client, this checkbox can be displayed, so the employee knows that the call is coming from the IVR.
16. Click the save button, 

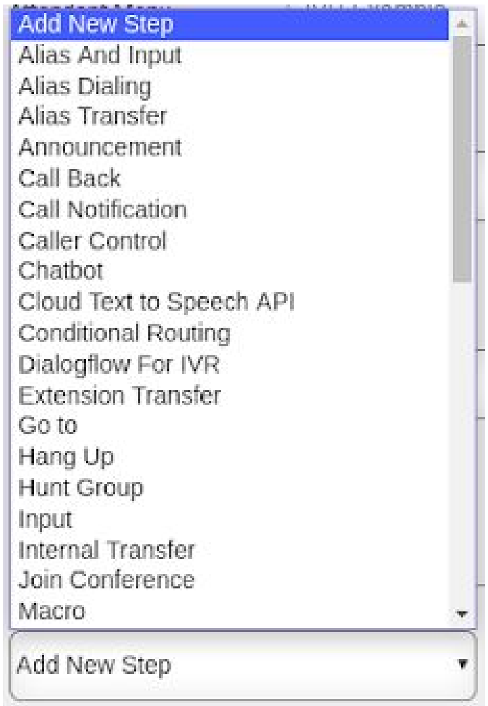
.

Adding Announcement Step

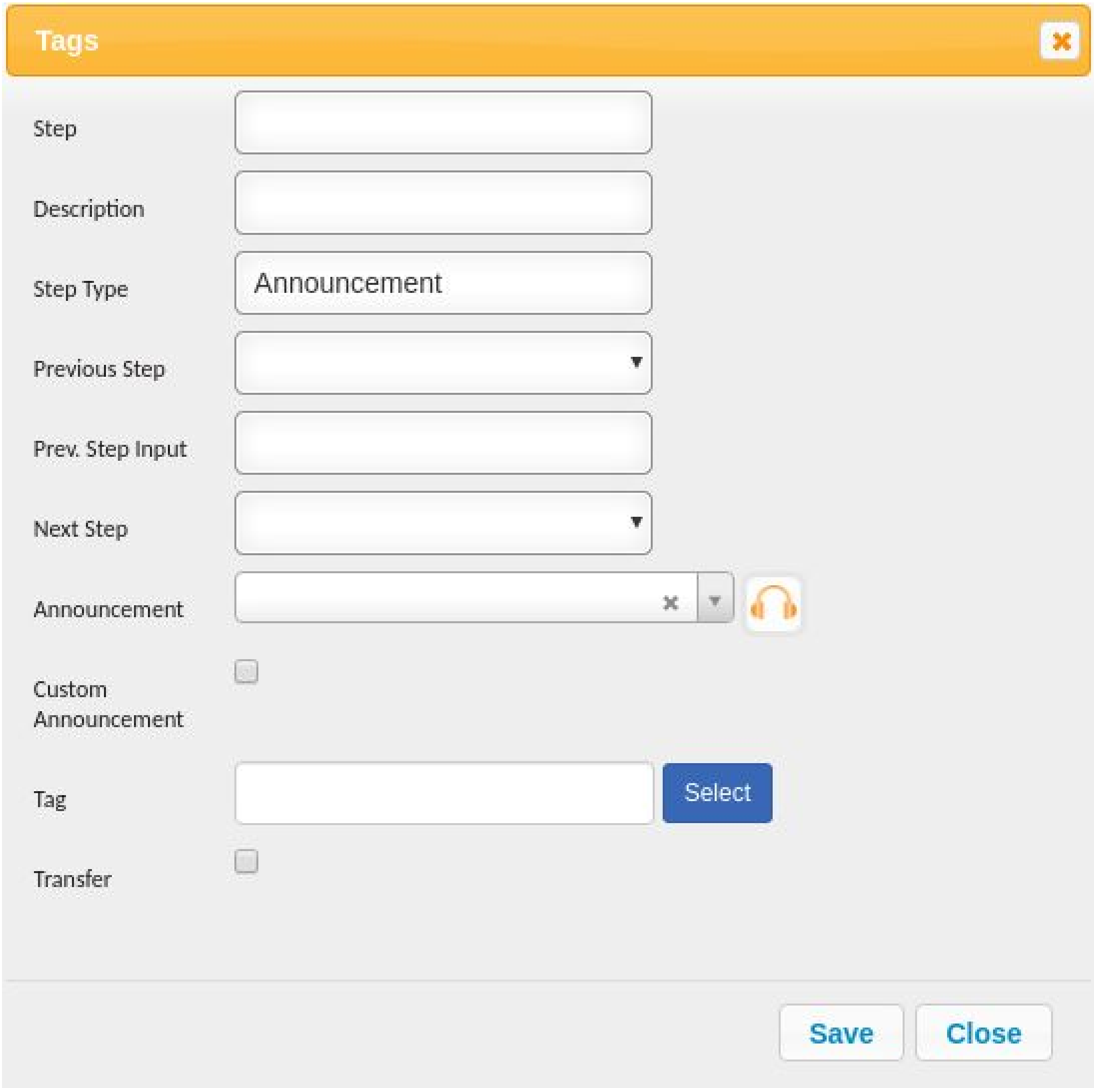
The specified entrance announcement (Welcome to XX Company) can be added using this IVR step.

1. Click the "Add New Step" dropdown box, 

, the following list will appear:



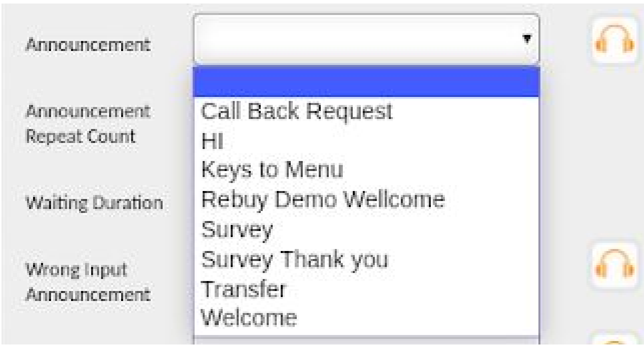
2. Select the "Announcement" step the following pop-up window will appear:

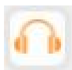


3. Click the "Step" input box, type the desired step name. An example is shown below:

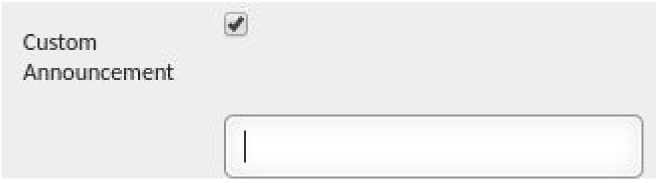
4. If desired in the "Description" input box, type a description for the step.
5. In the "Previous Step" dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.

6. Click the "Previous Step Input" input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer's numerical input).
7. In the "Next Step" dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the "Announcement" input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:

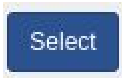


Note: Announcements can be listened to by clicking the following button,  *, located to the right of each Announcement dropdown list.*

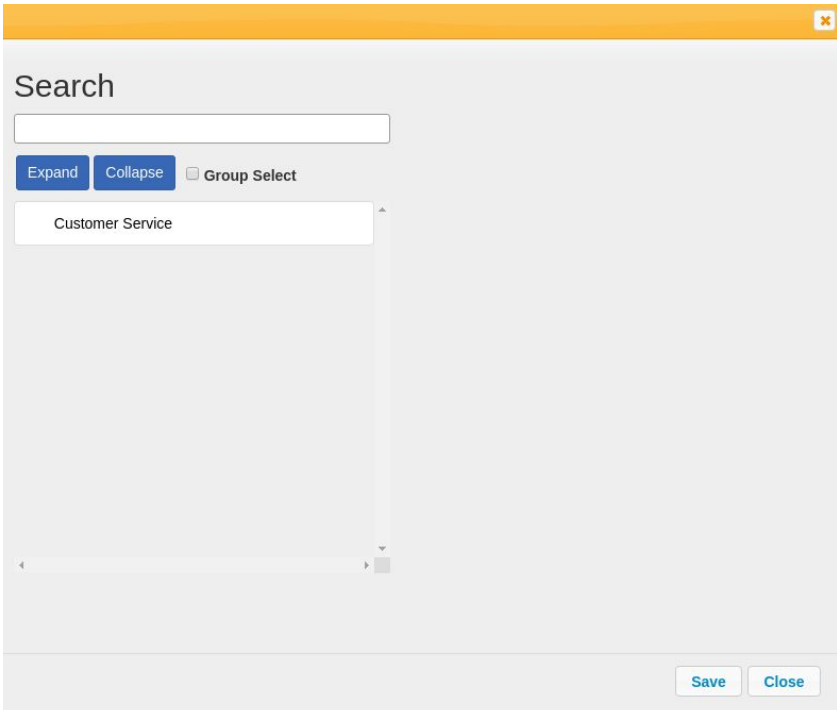
9. If desired, a Custom Announcement name can be created by checking the "Custom Announcement" checkbox (Used in combination with the Text-To-Speech step, contact the Call Center Studio Development team if a Text-to-Speech IVR is desired.) The following input box will appear:



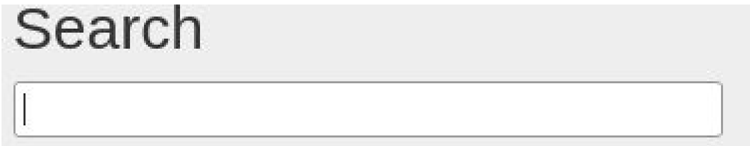
10. In the input box, type the custom announcement name.

11. If a tag is desired, click the Select button, 

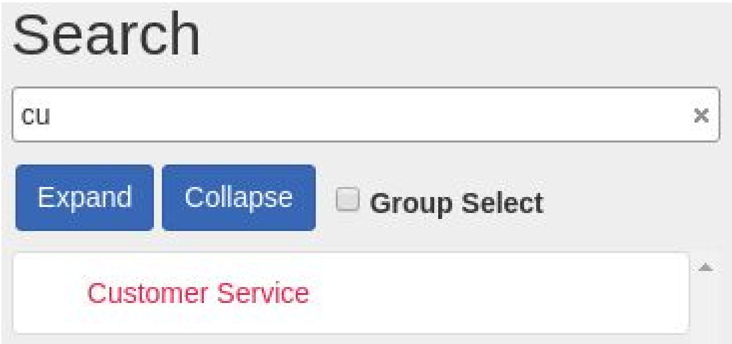
to the right of the "Tag" input box, the following pop-up window will appear:



12. Search for a Tag using the "Search" input box shown below:



Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



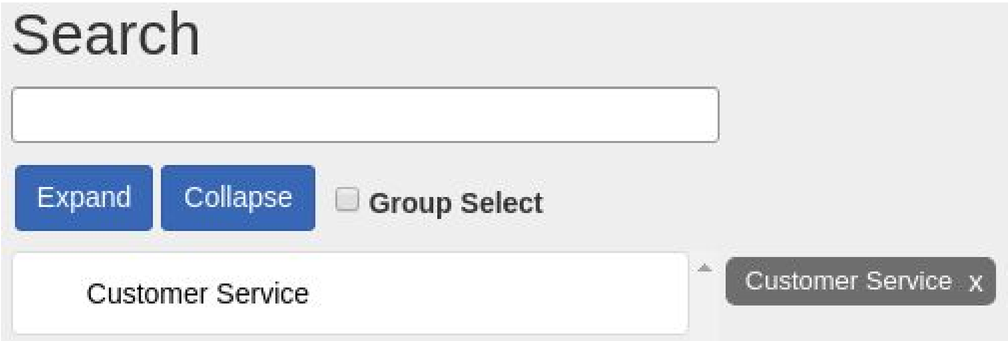
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

Check the Group Select Checkbox, Group Select *, to group select tags.*

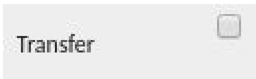
Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the "X," 

, to the right of the tag name.

13. Below the tag's input box, the following checkbox is displayed:



The description of the checkbox is explained below:

Transfer	Used by the Call Center Studio Development Team (Do not check)

14. Click the save button, 

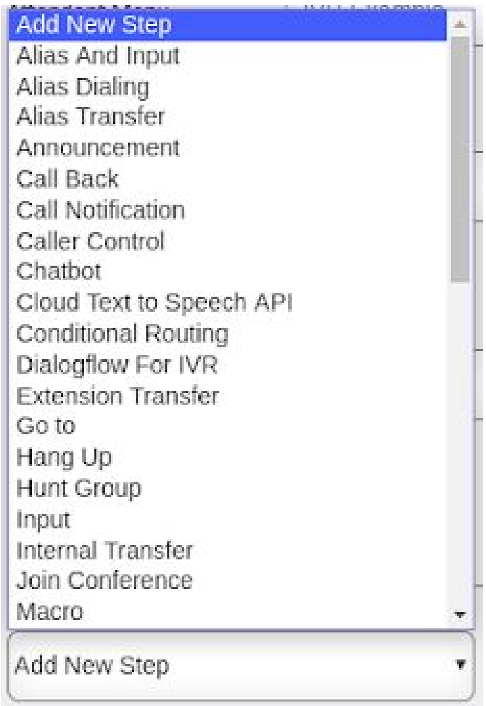
.

Adding Call Back Step

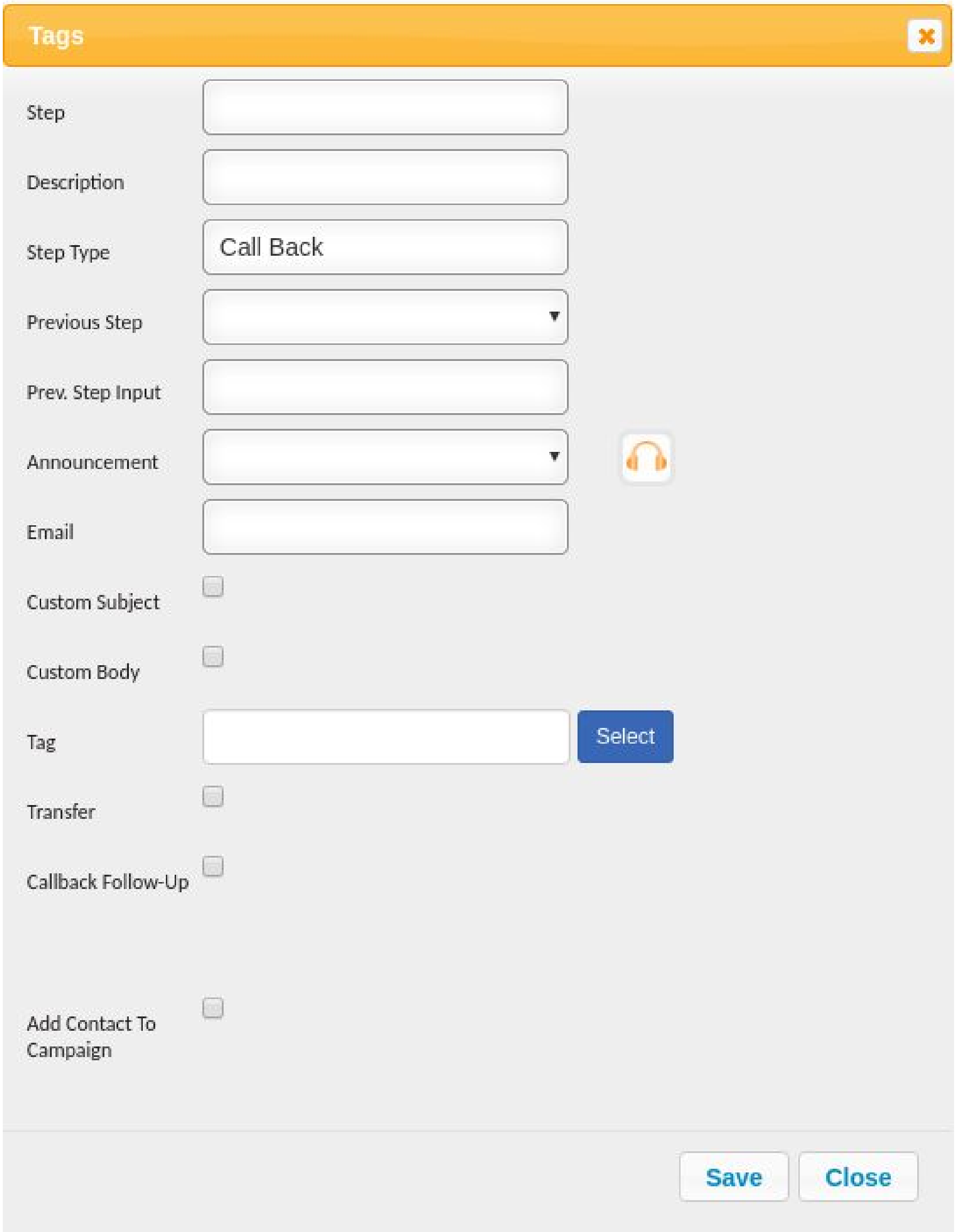
The step used to make a notification of missed calls by email.

1. Click the "Add New Step" dropdown box, 

, the following list will appear:

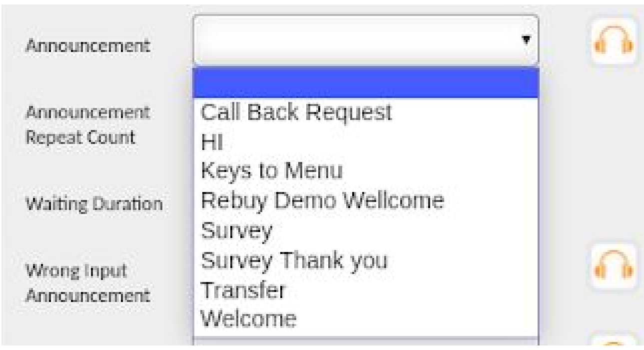


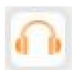
2. Select the "Call Back" step the following pop-up window will appear:



3. Click the "Step" input box, type the desired step name. An example is shown below:

4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:

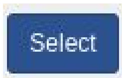


Note: Announcements can be listened to by clicking the following button,  *, located to the right of each Announcement dropdown list.*

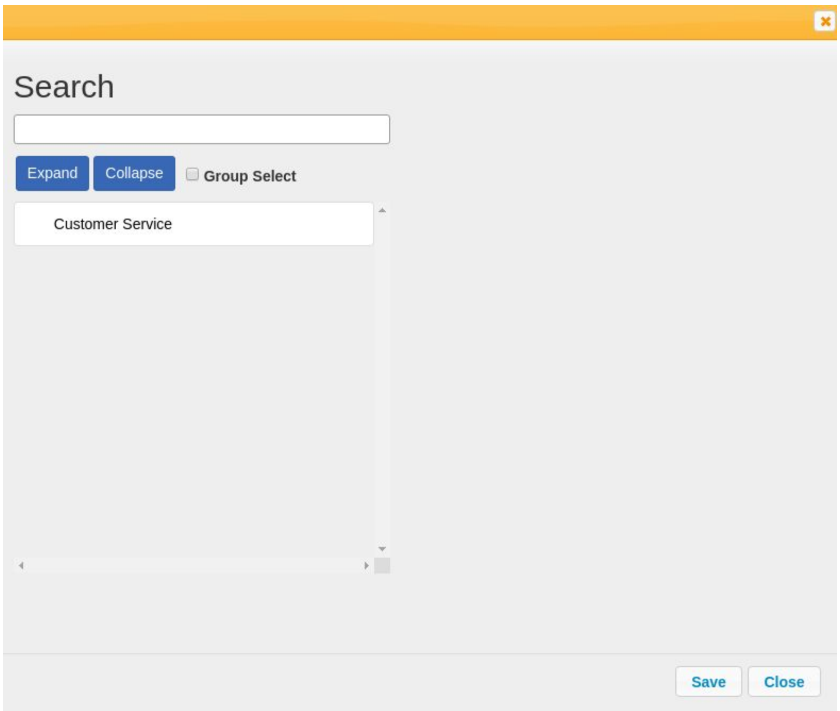
8. In the “Email” input box, type the desired email that the callback request will be sent to. (Note: multiple emails can be inputted using a comma, “,” to separate them. If the number of emails is over five, a group email is recommended to allow for successful email delivery.)

9. If desired, the “Custom Subject” checkbox can be checked. If checked, a custom email subject line can be created using the input box that appears:

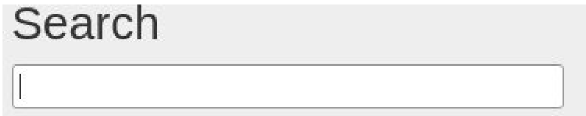
10. If desired, the “Custom Body” checkbox can be checked. If checked a custom email body can be created using the input box that appears:

11. If a tag is desired, click the Select button, 

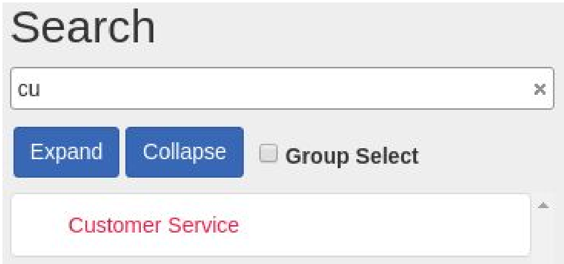
to the right of the “Tag” input box, the following pop-up window will appear:



12. Search for a Tag using the "Search" input box shown below:



Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



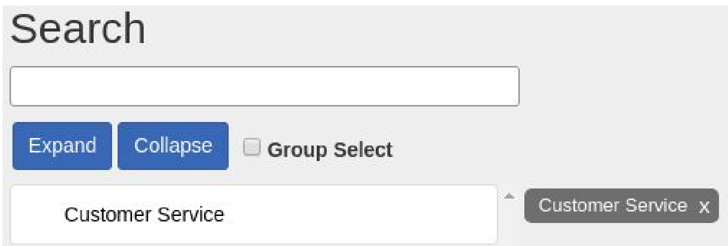
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

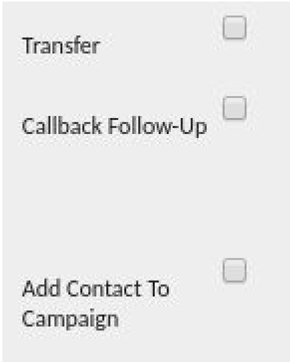
Check the Group Select Checkbox, Group Select *, to group select tags.*

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the "X," x*, to the right of the tag name.*

13. Below the tag's input box, the following three checkboxes are displayed:



The descriptions of these checkboxes are explained below:

Transfer	Used by the Call Center Studio Development Team (Do not check)
Callback Follow-up	When checked, the following will be displayed:  Click the “Callback Follow-up Control Time” type the desired time for the customer to be called back. Normally used in combination with the “Add Contact to Campaign” checkbox.

Add Contact to Campaign	When checked, the following will be displayed:  Click the “Target Campaign” dropdown menu to select the desired campaign. Click the “Target List Name” type the desired list name. Click the “Add after X minutes” type the desired time after calling to add the caller to the Target Campaign.

14. Click the save button, 

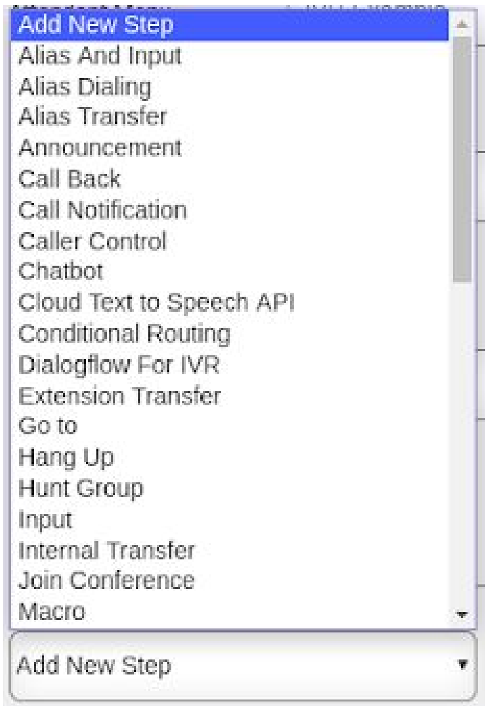
.

Adding Call Notification Step

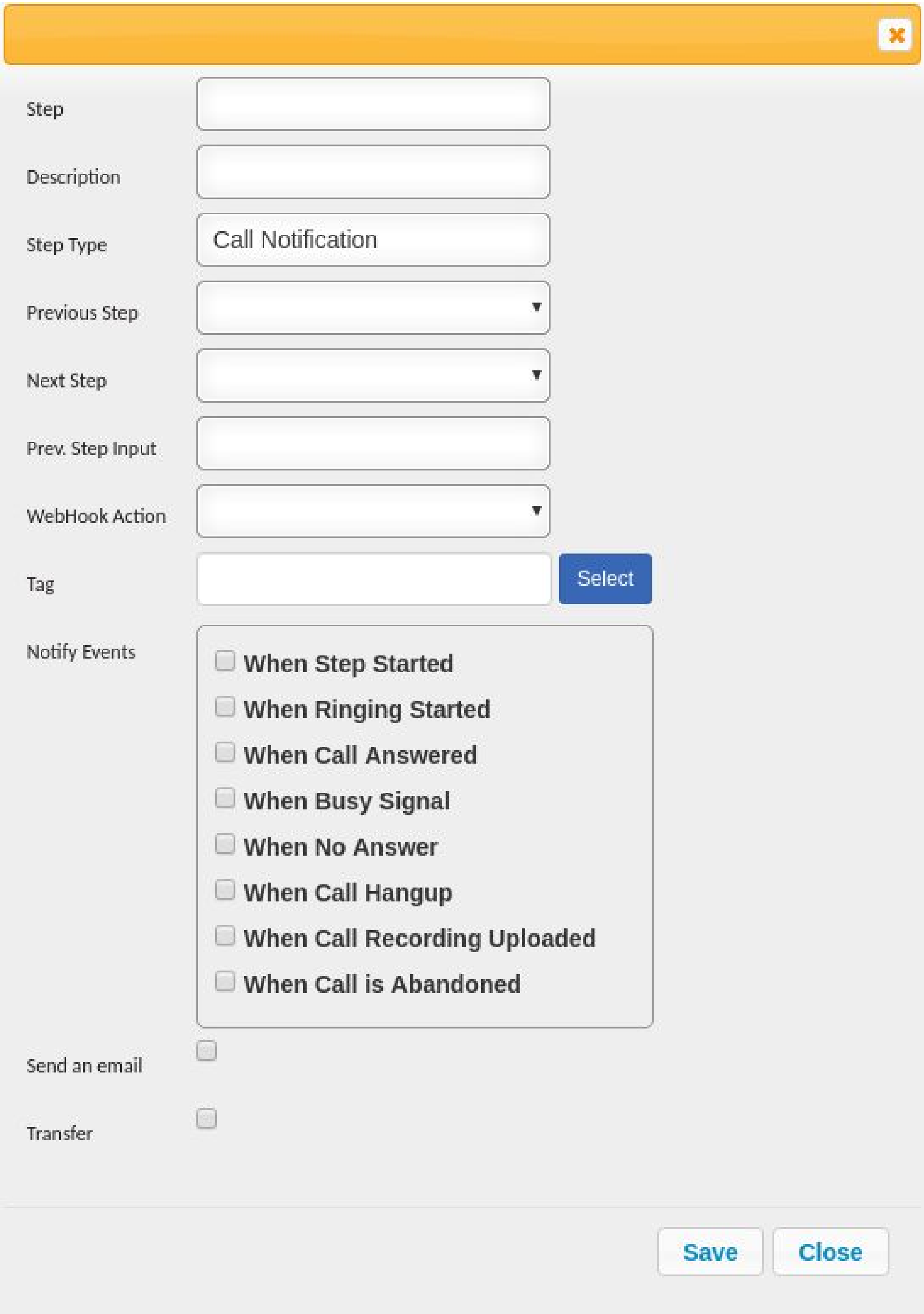
The step where the web service, prepared by the customer and defined by Webhook, is triggered based on the call status, according to the notification events selected for users using IP telephony.

1. Click the "Add New Step" dropdown box, 

, the following list will appear:

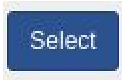


2. Select the "Call Notification" step the following pop-up window will appear:

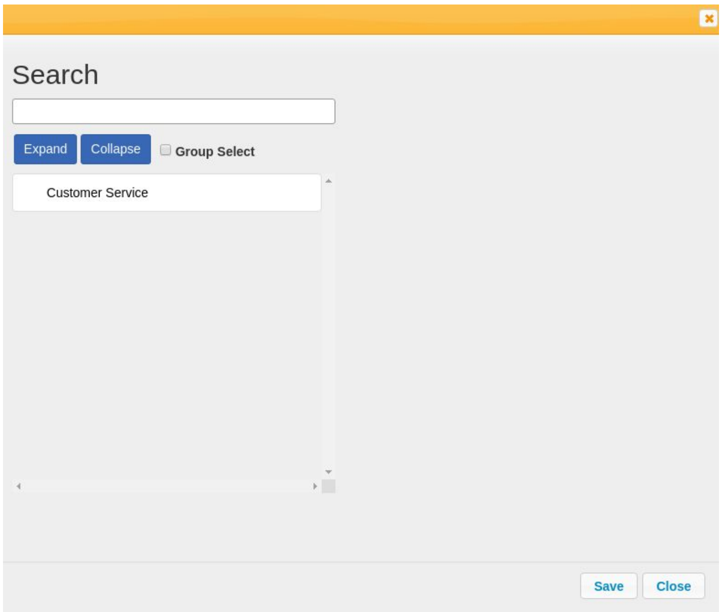


3. Click the "Step" input box, type the desired step name. An example is shown below:

4. If desired in the "Description" input box, type a description for the step.
5. In the "Previous Step" dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. In the "Next Step" dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
7. Click the "Previous Step Input" input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer's numerical input).
8. Click the "WebHook Action" input box, a dropdown menu will appear with created webhooks, select the desired webhook (See the Web URLs section for more information on creating webhooks).

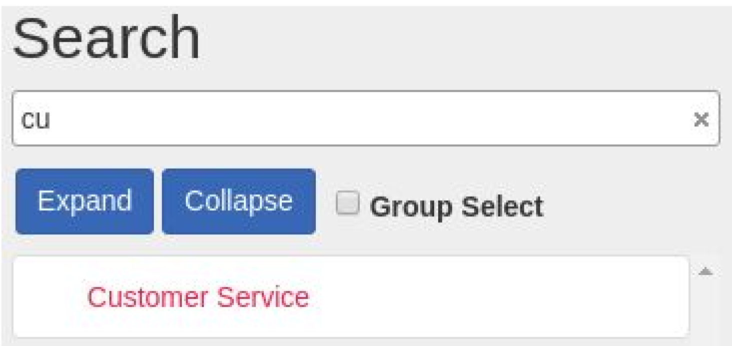
9. If a tag is desired, click the Select button, 

to the right of the "Tag" input box, the following pop-up window will appear:



10. Search for a Tag using the "Search" input box shown below:

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



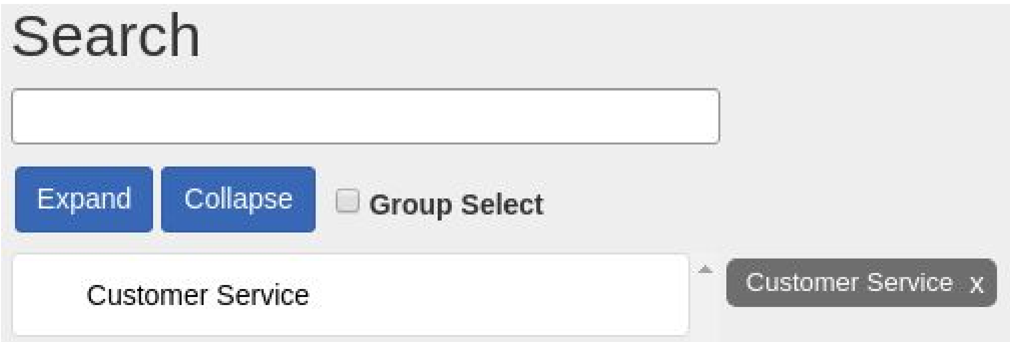
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

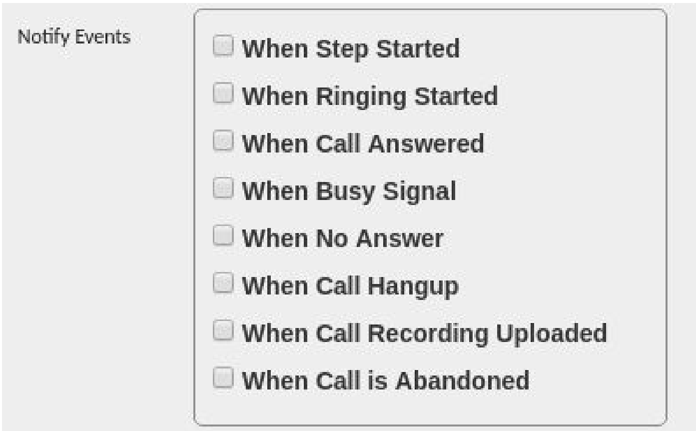
Check the Group Select Checkbox, Group Select *, to group select tags.*

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:

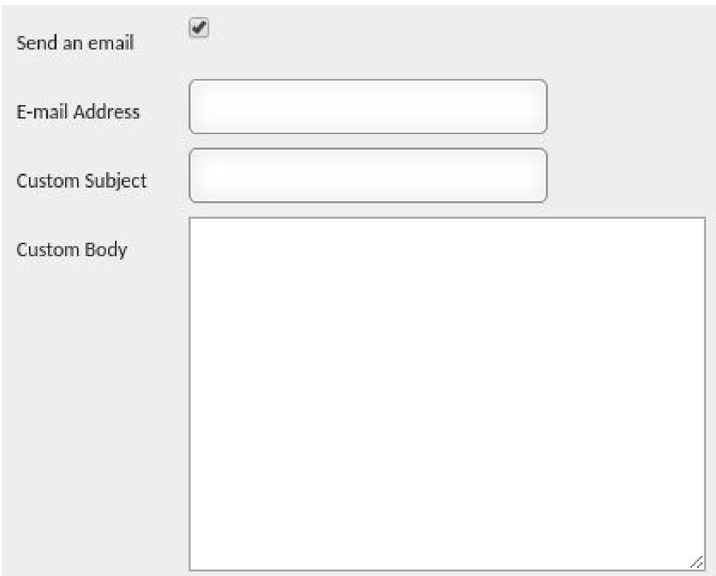


Note: To delete a Tag from the selection simply click the "X," x*, to the right of the tag name*

11. Call Notification events can be sent to a user via email notification or web service via the created Webhook in the Web URLs section. The following notification events can be selected, the user then would receive notifications regarding the checked events via email or a web service (For more information or set up questions contact the assigned Call Center Studio Project Manager).



12. If desired notifications can be sent via email instead of a web service by checking the "Send an email" checkbox, once selected the following input boxes will be displayed:

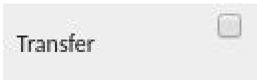


13. In the “Email Address,” input box type the desired email addresses.

14. In the “Custom Subject” input box, type a custom email subject line if desired.

15. In the “Custom Body” input box, type a custom email body if desired.

16. Below the “Send an email” input box, the following checkbox is displayed:



The description of the checkbox is explained below:

Transfer	Used by the Call Center Studio Development Team (Do not check)

17. Click the save button, 

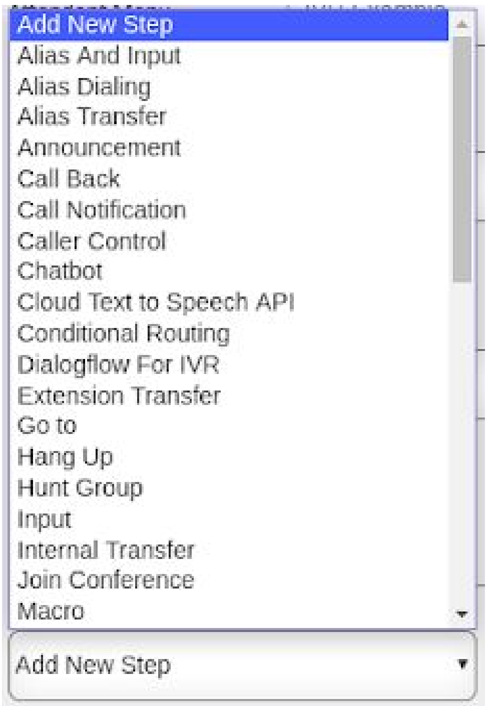
.

Adding Hang Up Step

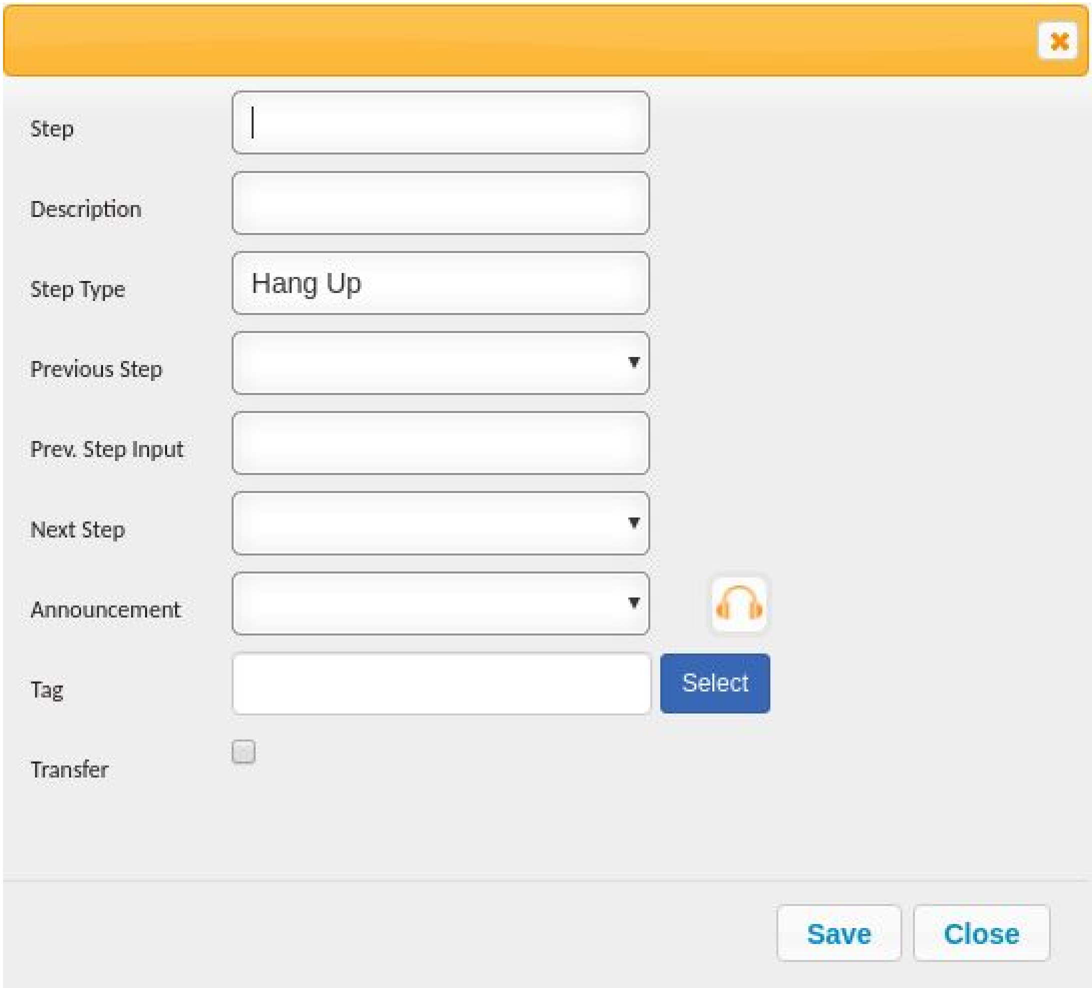
The step is used to disconnect the call.

1. Click the "Add New Step" dropdown box, 

, the following list will appear:



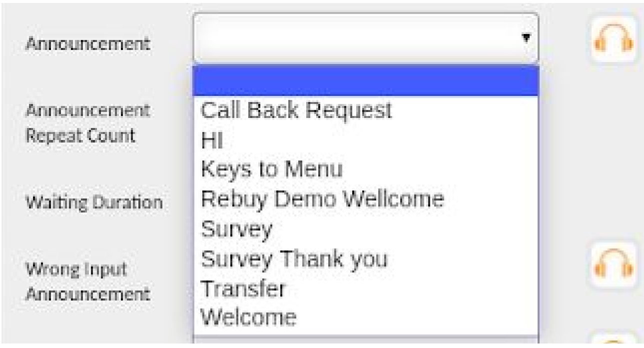
2. Select the “Hang up” step the following pop-up window will appear:

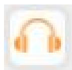


3. Click the “Step” input box, type the desired step name. An example is shown below:

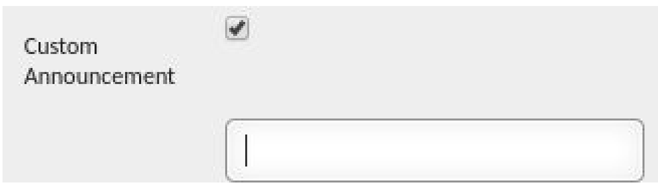
4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).

7. In the "Next Step" dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the "Announcement" input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:

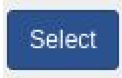


Note: Announcements can be listened to by clicking the following button,  *, located to the right of each Announcement dropdown list.*

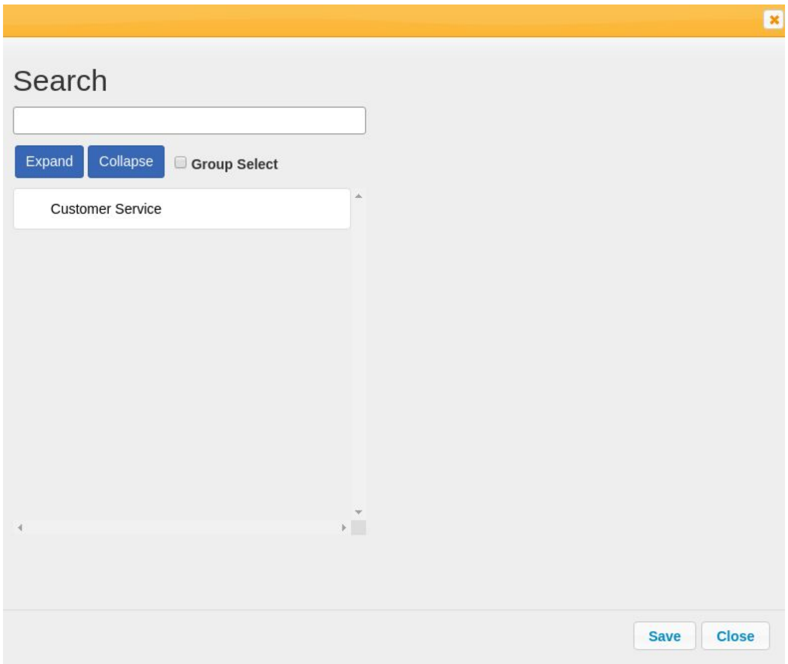
9. If desired, a Custom Announcement name can be created by checking the "Custom Announcement" checkbox. The following input box will appear:



10. In the input box, type the custom announcement name.

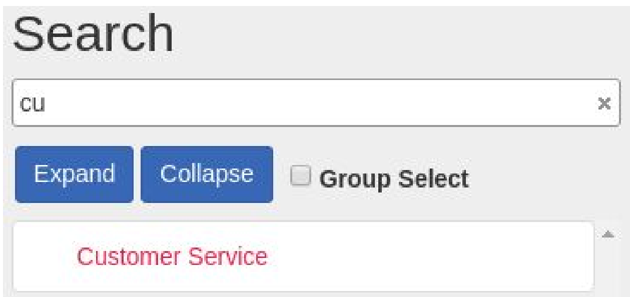
11. If a tag is desired, click the Select button, 

to the right of the "Tag" input box, the following pop-up window will appear:



12. Search for a Tag using the "Search" input box shown below:

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



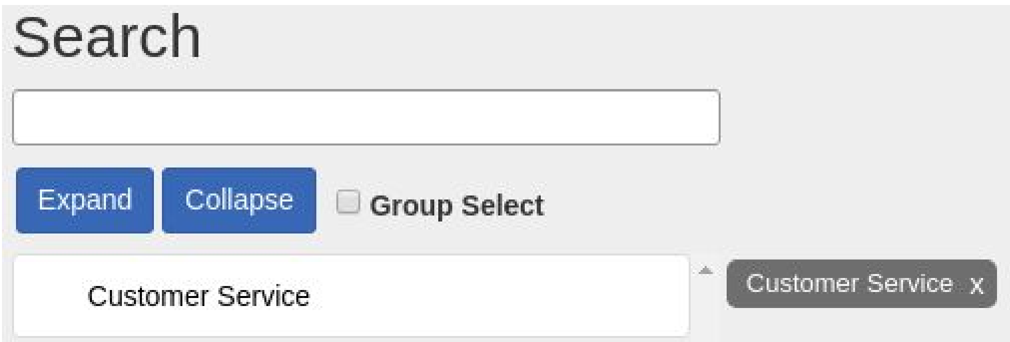
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

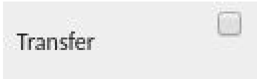
Check the Group Select Checkbox, Group Select*, to group select tags.*

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the "X," x*, to the right of the tag name.*

13. Below the tag's input box, the following checkbox is displayed:



The description of the checkbox is explained below:

Transfer	Used by the Call Center Studio Development Team (Do not check)

14. Click the save button, 

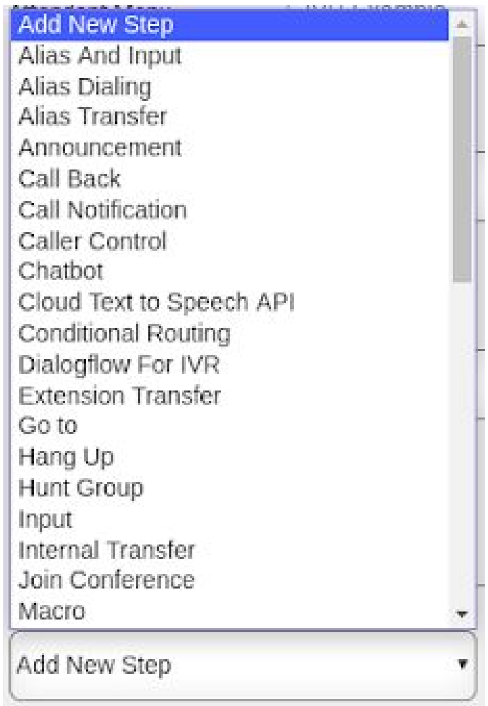
.

Adding Input Step

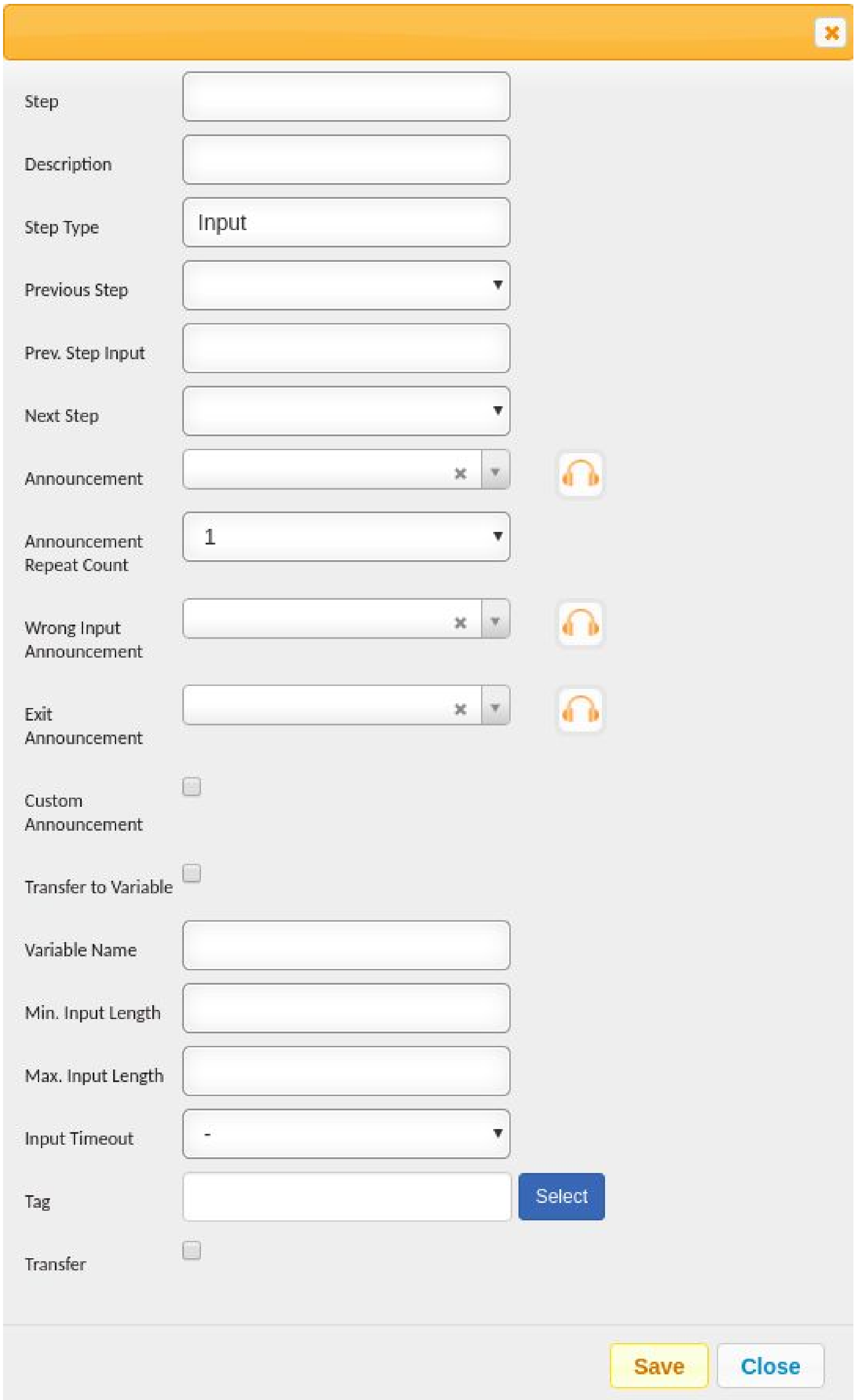
The step is used to create an input step for the caller based on an announcement.

1. Click the "Add New Step" dropdown box, 

, the following list will appear:

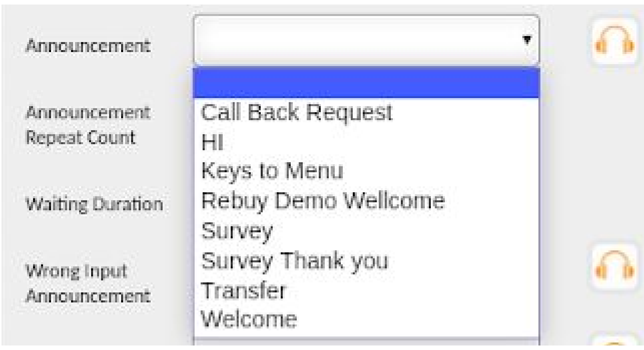


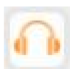
2. Select the “Input” step the following pop-up window will appear:



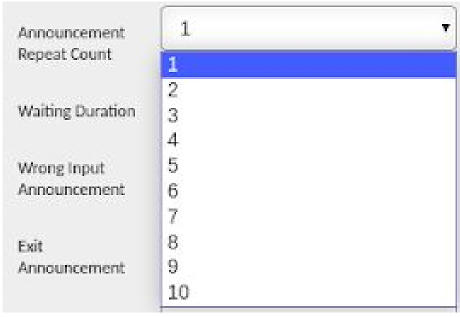
3. Click the “Step” input box, type the desired step name. An example is shown below:

4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:

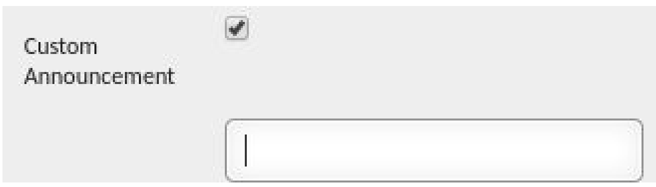


Note: Announcements can be listened to by clicking the following button,  *, located to the right of each Announcement dropdown list.*

9. Click the “Announcement Repeat Count” input box the following dropdown list will appear:



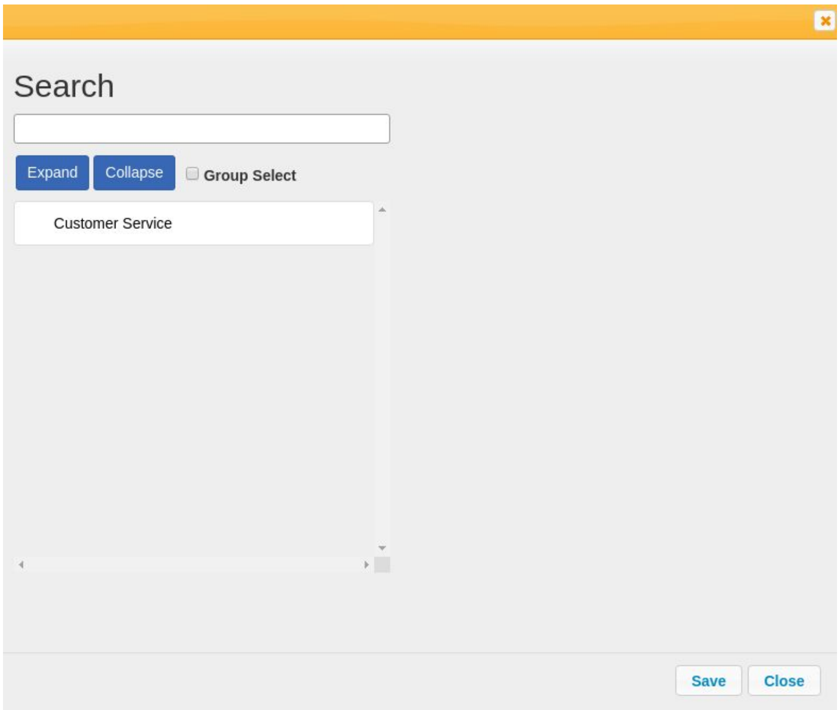
10. Select the desired repeat count.
11. Click the “Wrong Input Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.
12. Click the “Exit Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.
13. If desired, a Custom Announcement name can be created by checking the “Custom Announcement” checkbox. The following input box will appear:



14. In the input box, type the custom announcement name.
15. The agent can transfer to a variable by checking the “Transfer to Variable” checkbox.
16. If the “Transfer to Variable” checkbox is checked, click the “Variable Name” input box and type the desired variable name (user’s name).

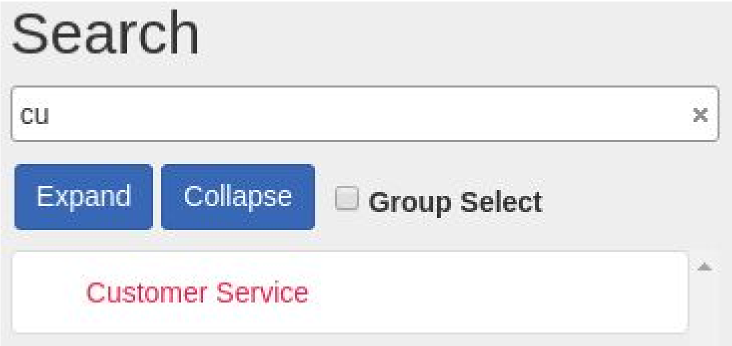
17. Click the "Min. Input Length" input box type the minimum input length, always "1."
18. Click the "Max. Input Length" input box type the maximum input length for the customer to select. For example, if the Alias's range between 3 digits and 4 digits, the max input length will be 4.
19. In the "Input Timeout," dropdown box type select the timeout duration for the customer input (Seconds).
20. If a tag is desired, click the Select button, 

to the right of the "Tag" input box, the following pop-up window will appear:



21. Search for a Tag using the "Search" input box shown below:

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



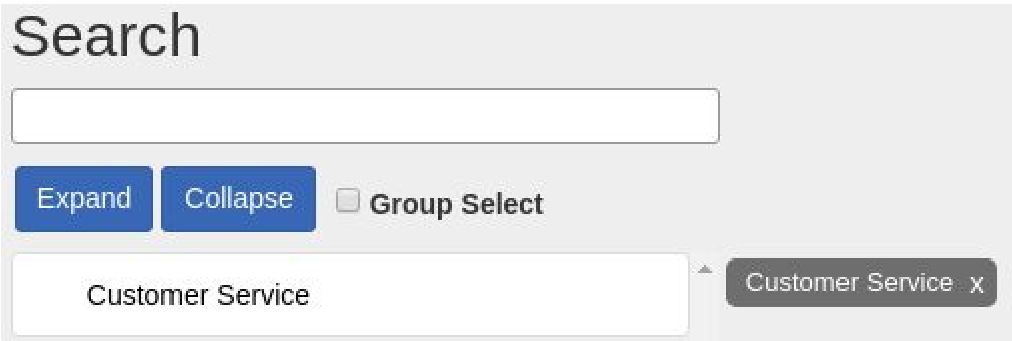
Note:

Press the Expand button,  *, to expand the selection*

Press the Collapse button,  *, to collapse the selection*

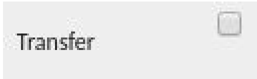
Check the Group Select Checkbox,  *, to group select tags.*

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the "X,"  *, to the right of the tag name.*

22. Below the tag's input box, the following checkbox is displayed:



The description of the checkbox is explained below:

Transfer	Used by the Call Center Studio Development Team (Do not check)

23. Click the save button, 

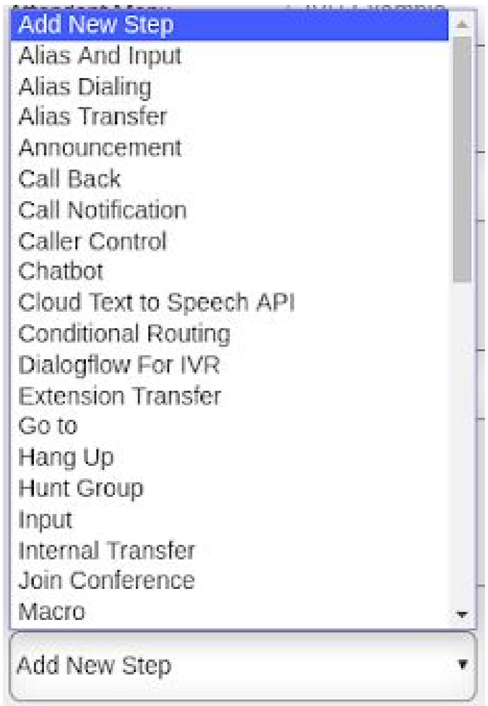
.

Adding Conditional Routing Step

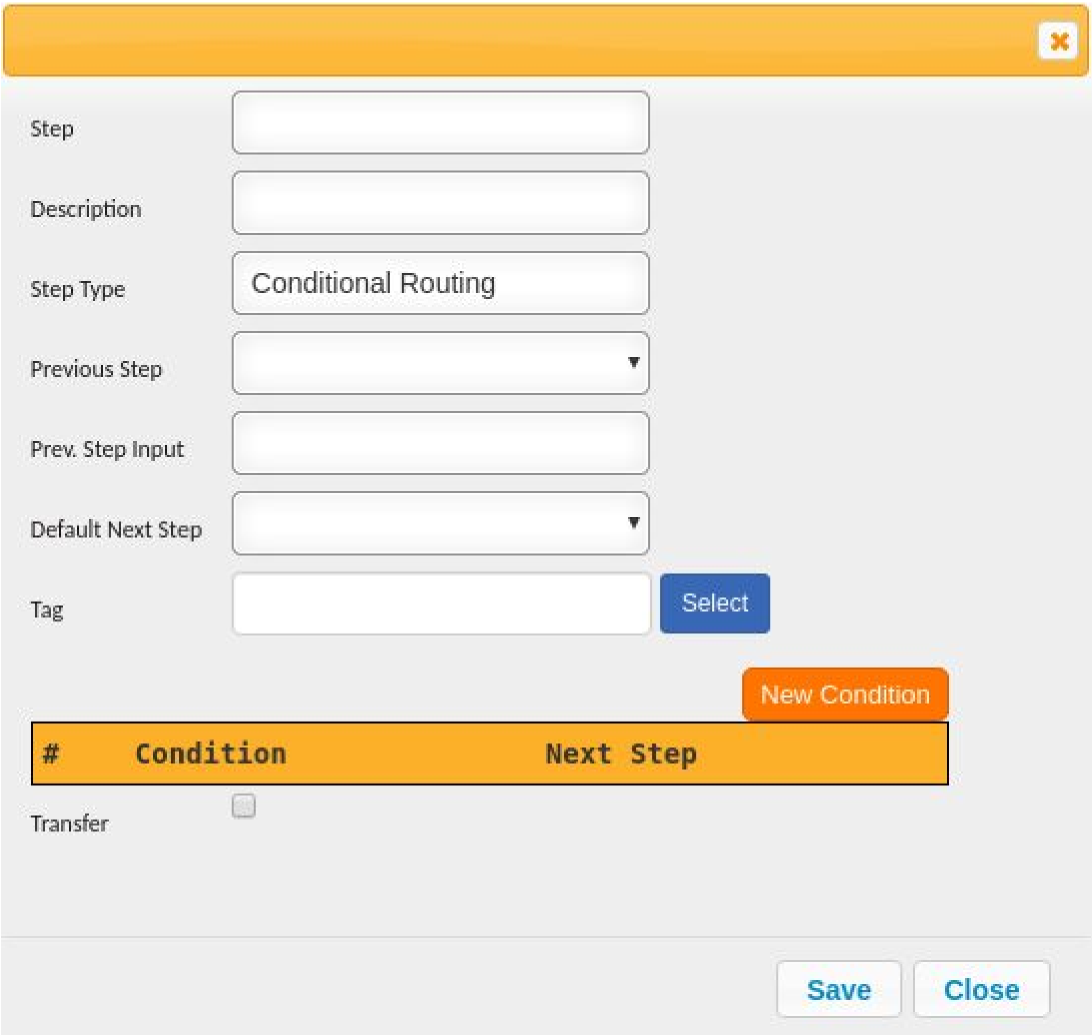
Enables the call to be sent to a specific step of IVR according to the response returned from the variable or standard responses returned from the web service prepared by the user of the tenant (e.g., Cancellation, Preparing Order, In Cargo).

1. Click the “Add New Step” dropdown box, 

, the following list will appear:

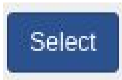


2. Select the “Conditional Routing” step the following pop-up window will appear:

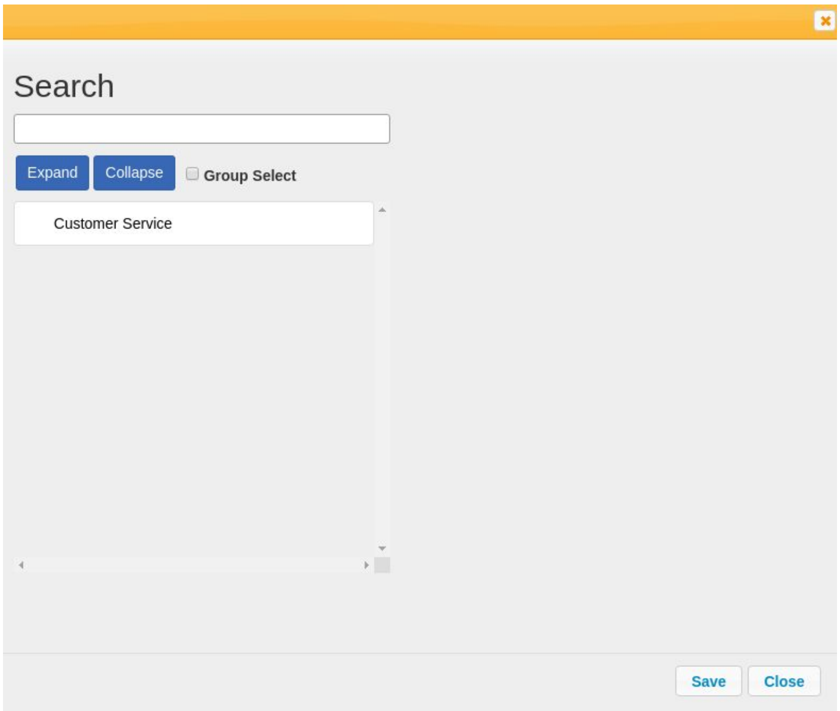


3. Click the “Step” input box, type the desired step name. An example is shown below:

4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.

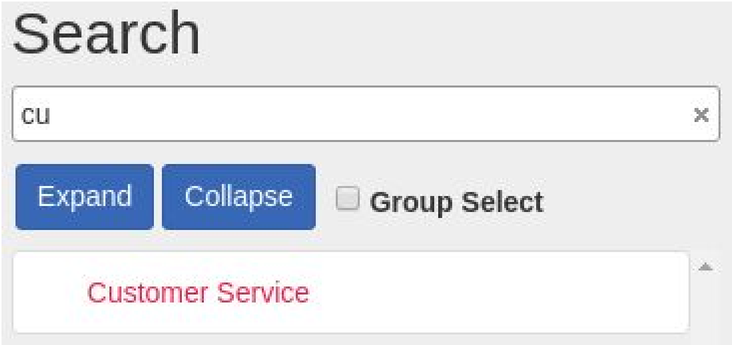
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Default Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. If a tag is desired, click the Select button, 

to the right of the “Tag” input box, the following pop-up window will appear:



9. Search for a Tag using the “Search” input box shown below:

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



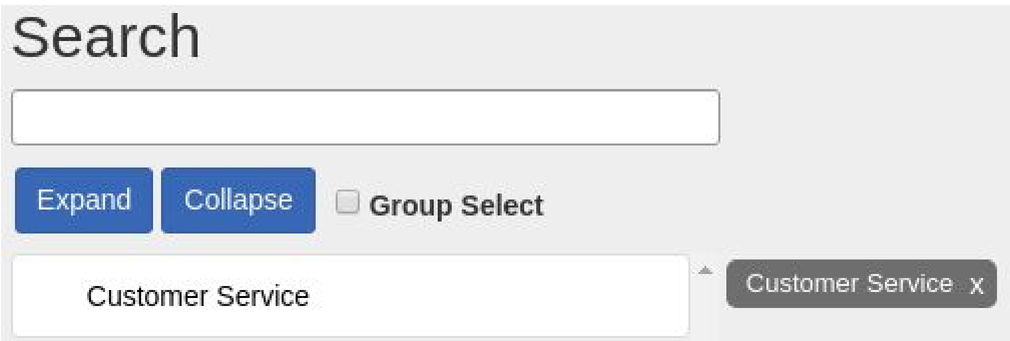
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

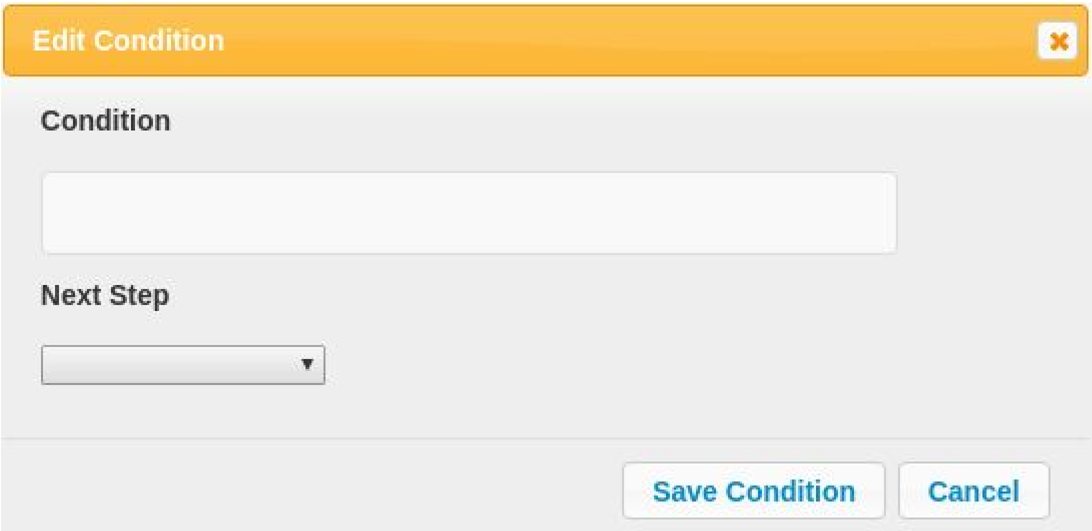
Check the Group Select Checkbox, Group Select *, to group select tags*

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



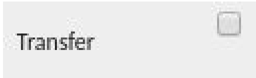
Note: To delete a Tag from the selection simply click the "X," x*, to the right of the tag name.*

10. To add a condition, press the new condition button, New Condition, the following pop-up screen will appear:



11. In the "Condition" input box, type the condition (Defined value is written in web service).
12. Click the "Next Step" dropdown box, select the desired next step (The step that is desired to correspond to the value is selected). It is recommended to link all steps after setting up the IVR.
13. Click the save condition button, Save Condition.
14. Continue adding desired conditions.

15. Below the condition steps, the following checkbox is displayed:



The description of the checkbox is explained below:

Transfer	Used by the Call Center Studio Development Team (Do not check)

16. Click the save button, 

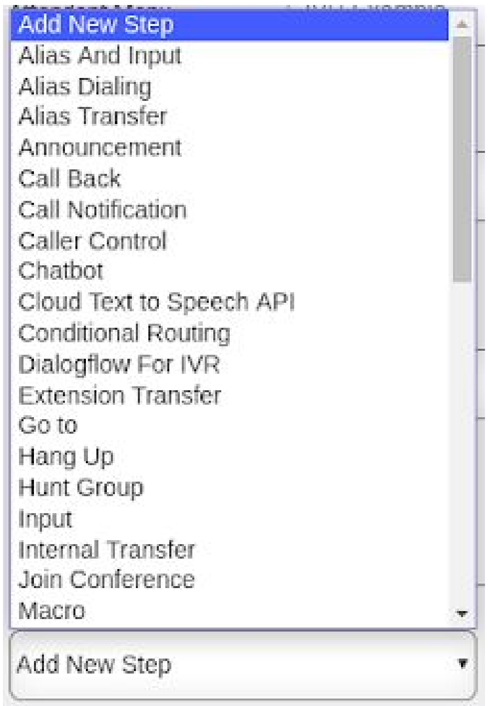
.

Adding Satisfaction Survey Question Step

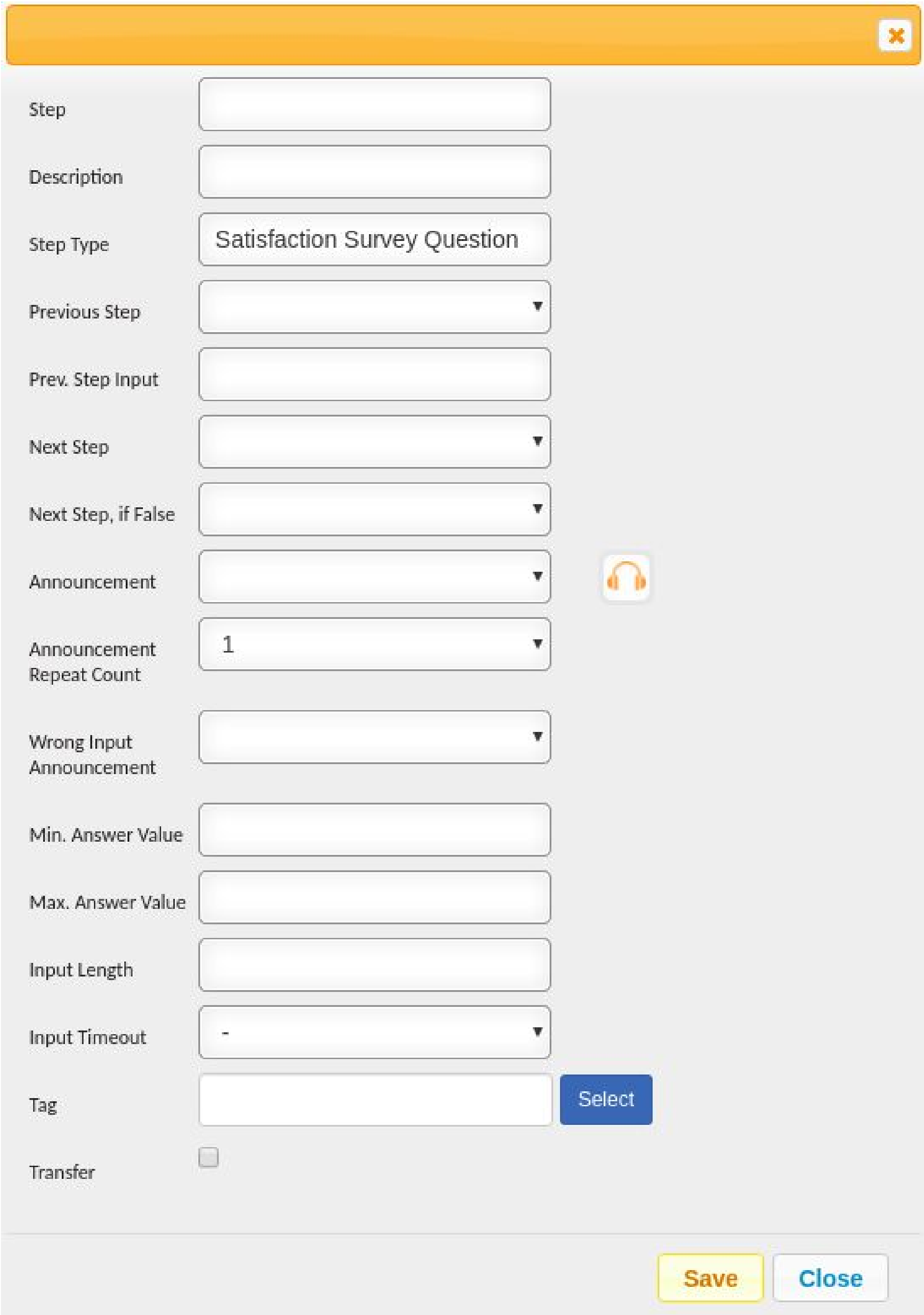
The step is used to create a customer satisfaction survey question.

1. Click the "Add New Step" dropdown box, 

, the following list will appear:



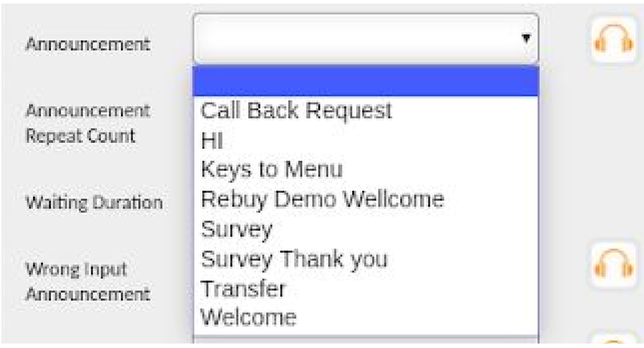
2. Select the “Satisfaction Survey Question” step the following pop-up window will appear:

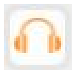


3. Click the “Step” input box, type the desired step name. An example is shown below:

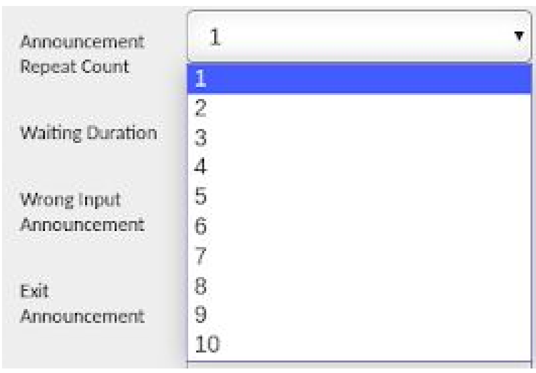
4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. In the “Next Step if False” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.

9. Click the "Announcement" input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:

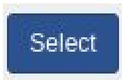


Note: Announcements can be listened to by clicking the following button,  *, located to the right of each Announcement dropdown list.*

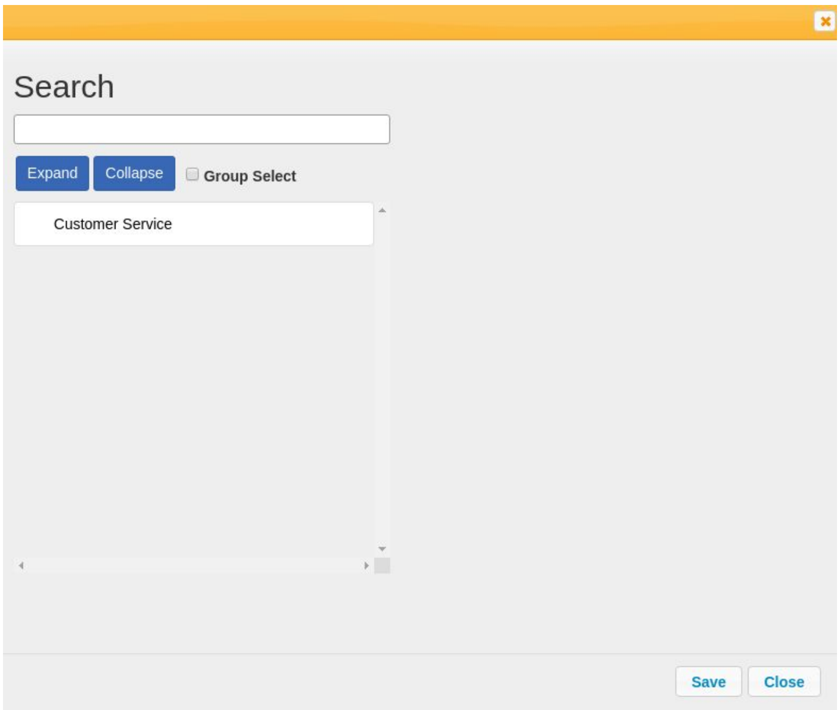
10. Click the "Announcement Repeat Count" input box the following dropdown list will appear:



11. Select the desired repeat count.
12. Click the "Wrong Input Announcement" input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.

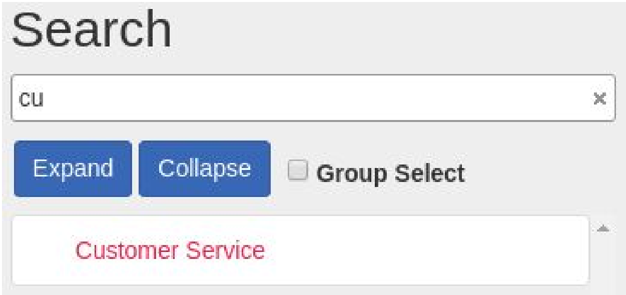
13. Click the “Min. Answer Value” input box type the minimum answer value for the customer to select. For example, if the survey range is 1 to 5, the minimum answer value would be 1.
14. Click the “Max. Answer Value” input box type the maximum answer value for the customer to select. For example, if the survey range is 1 to 5, the maximum answer value would be 5.
15. Click the “Input Length” input box type the input length for the customer to select. For example, if the survey is one question, the input length would be 1.
16. In the “Input Timeout,” dropdown box type select the timeout duration for the customer input (Seconds).
17. If a tag is desired, click the Select button, 

to the right of the “Tag” input box, the following pop-up window will appear:



18. Search for a Tag using the “Search” input box shown below:

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



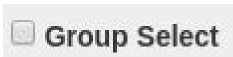
Note:

Press the Expand button, 

, to expand the selection

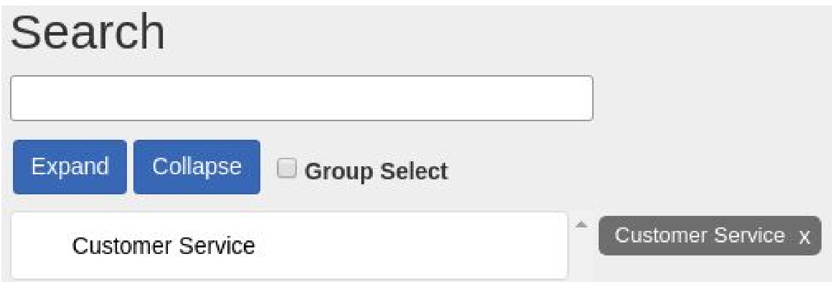
Press the Collapse button, 

, to collapse the selection

Check the Group Select Checkbox, 

, to group select tags.

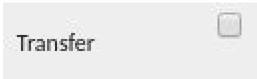
Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the "X," 

, to the right of the tag name.

19. Below the tag's input box, the following checkbox is displayed:



The description of the checkbox is explained below:

Transfer	Used by the Call Center Studio Development Team (Do not check)

20. Click the save button, 

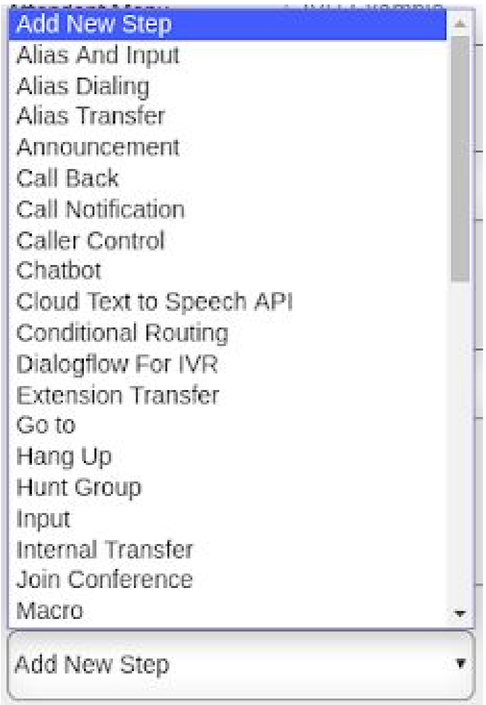
.

Adding Satisfaction Survey Result Step

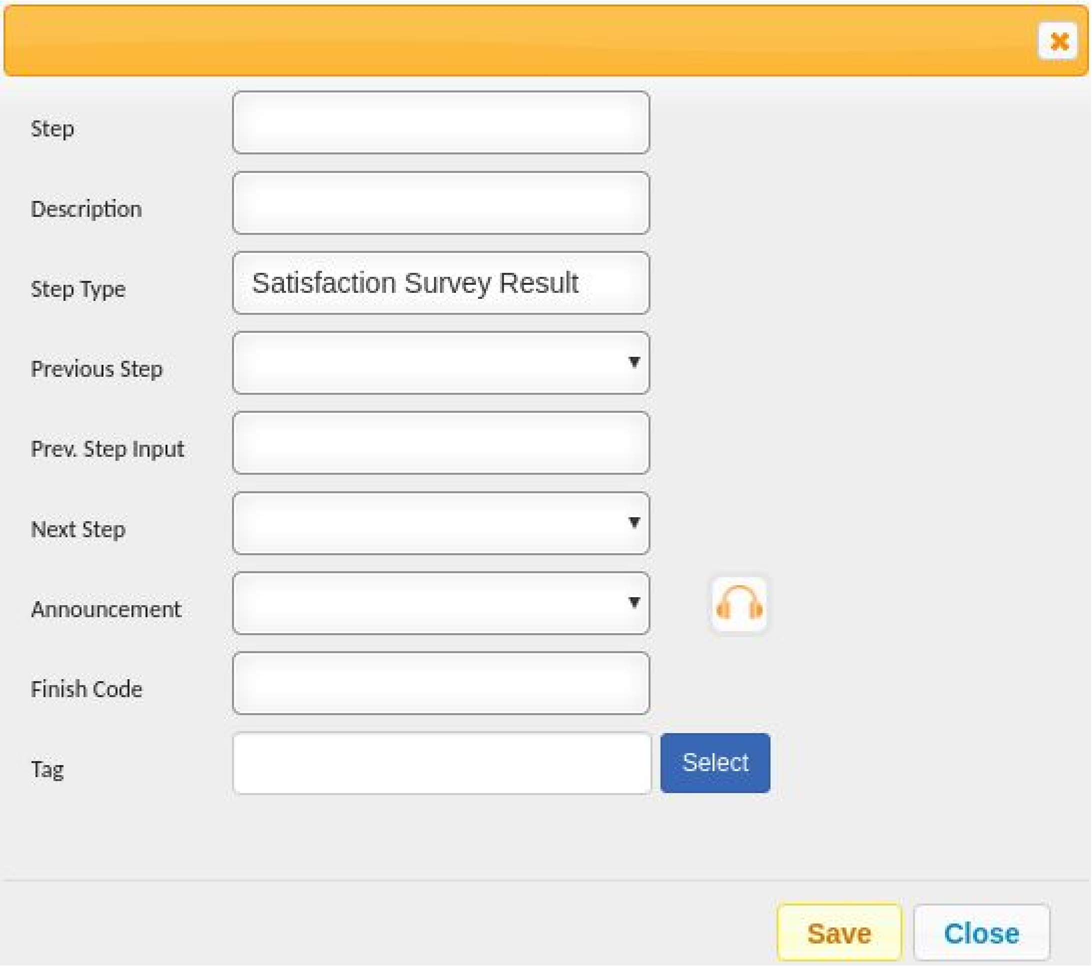
The step used to create customer satisfaction input for the satisfaction survey. (Completes the survey, without using this on the Quality Control Screen the survey will be listed as incomplete).

1. Click the "Add New Step" dropdown box, 

, the following list will appear:



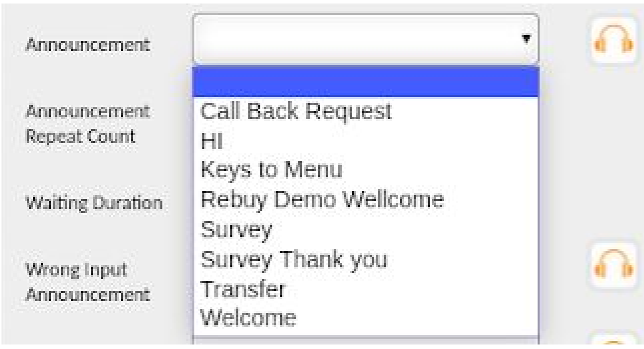
2. Select the “Satisfaction Survey Question” step the following pop-up window will appear:

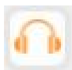


3. Click the “Step” input box, type the desired step name. An example is shown below:

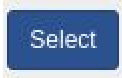
4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.

6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:

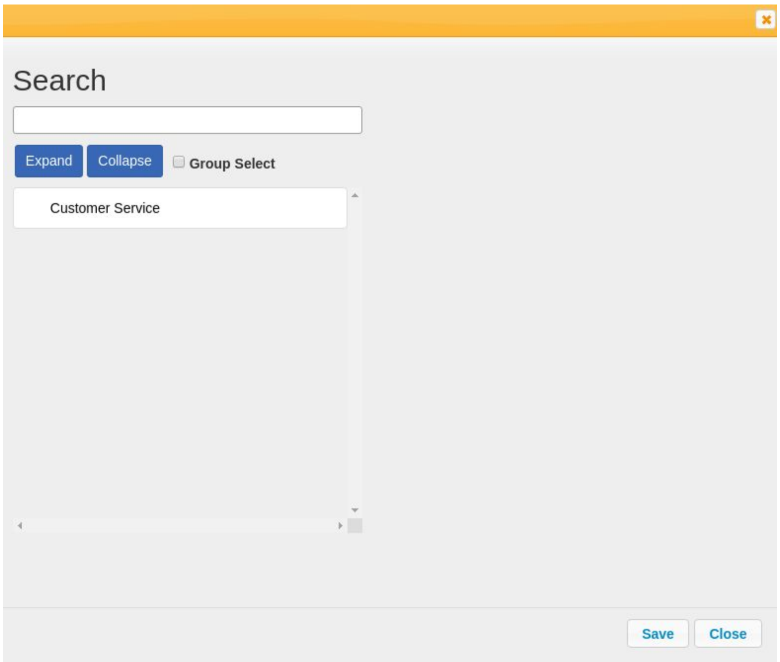


Note: Announcements can be listened to by clicking the following button,  *, located to the right of each Announcement dropdown list.*

9. Click the “Finish Code” input box, type the desired finish code an example is shown below:

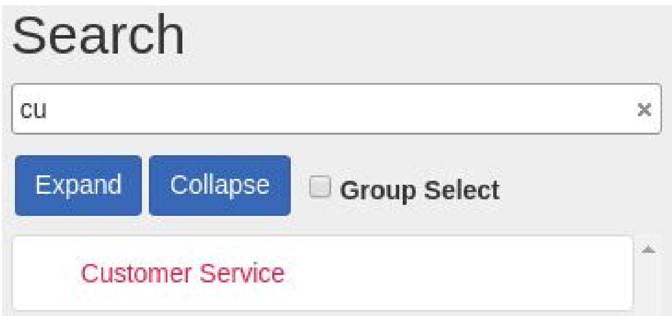
10. If a tag is desired, click the Select button, 

to the right of the "Tag" input box, the following pop-up window will appear:



11. Search for a Tag using the "Search" input box shown below:

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



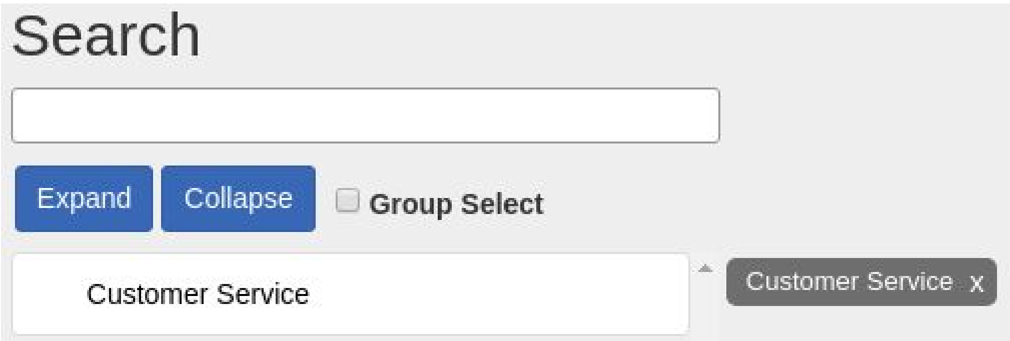
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

Check the Group Select Checkbox, Group Select *, to group select tags.*

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the "X," x*, to the right of the tag name.*

12. Below the tag's input box, the following checkbox is displayed:

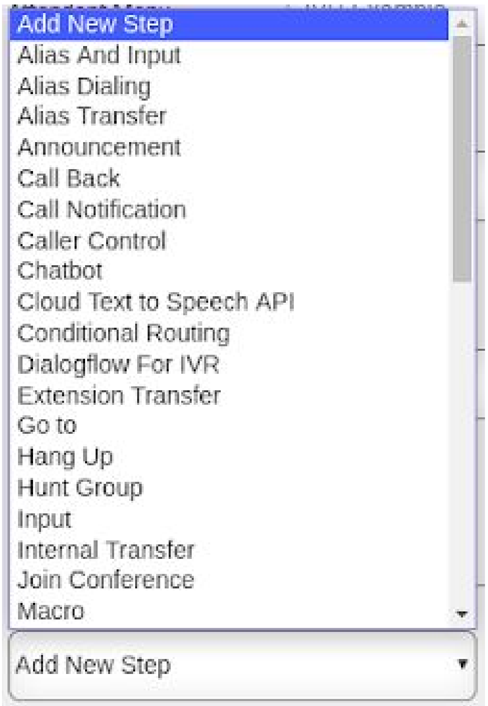
13. Click the save button, Save.

Adding Transfer Step

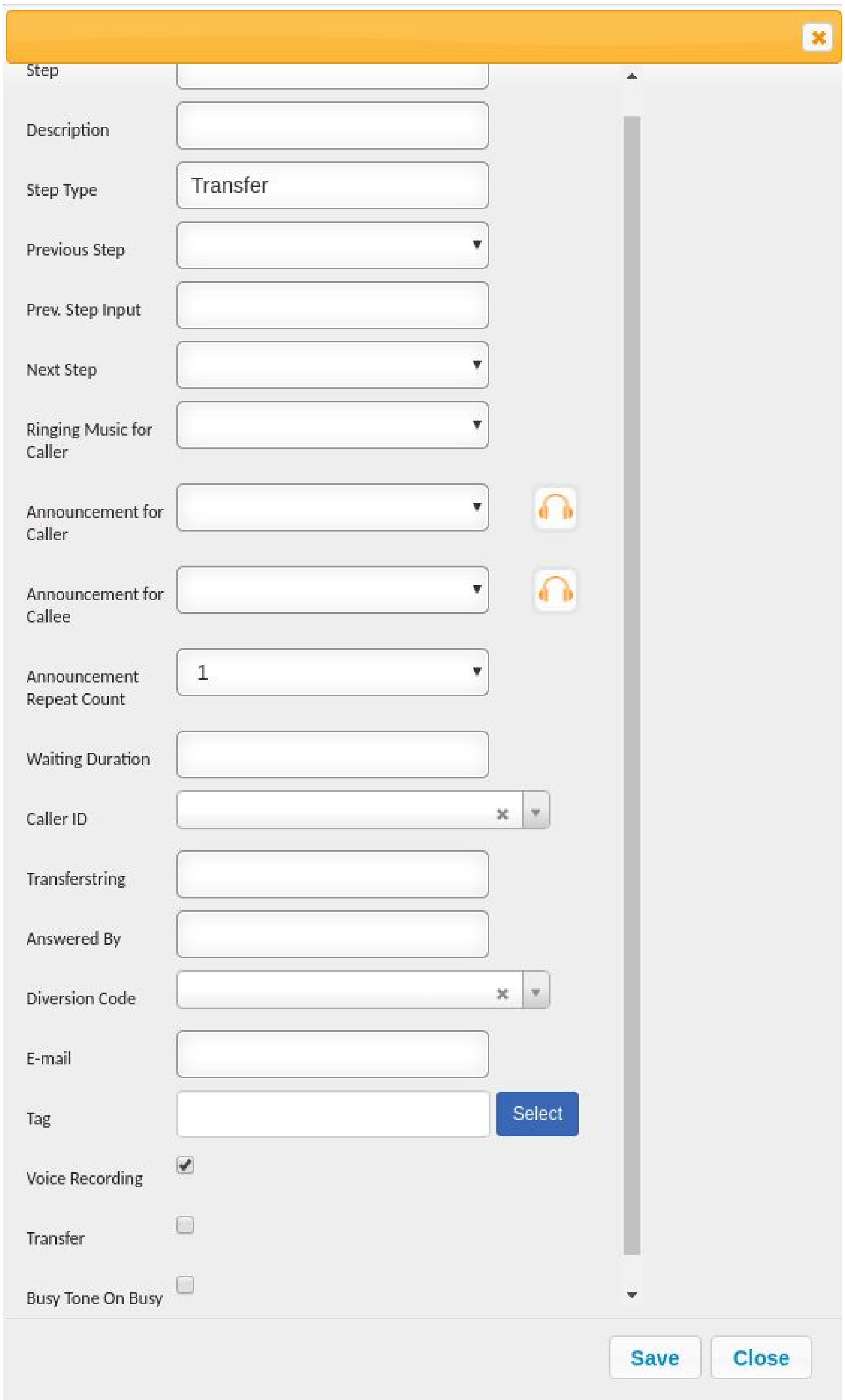
In cases where the system cannot be active due to internal/external factors or out of time, incoming calls are directed using this step to the desired number so that there are no missed calls.

1. Click the "Add New Step" dropdown box, 

, the following list will appear:

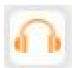


2. Select the "Transfer" step the following pop-up window will appear:



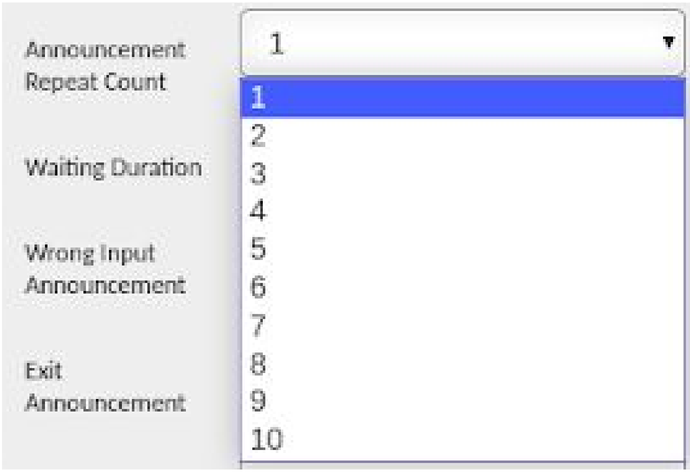
3. Click the “Step” input box, type the desired step name. An example is shown below:

4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Ringing Music for Caller,” a dropdown list will appear, select the desired music (Ringing music can be added by request to the Call Center Studio Development Team).
9. Click the “Announcement for Caller” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.

Note: Announcements can be listened to by clicking the following button,  *, located to the right of each Announcement dropdown list.*

10. Click the “Announcement for Callee” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.

11. Click the “Announcement Repeat Count” input box the following dropdown list will appear:

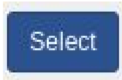


12. Select the desired repeat count.
13. In the “Waiting Duration” input box type the waiting duration for the customer input (Seconds) an example is shown below:

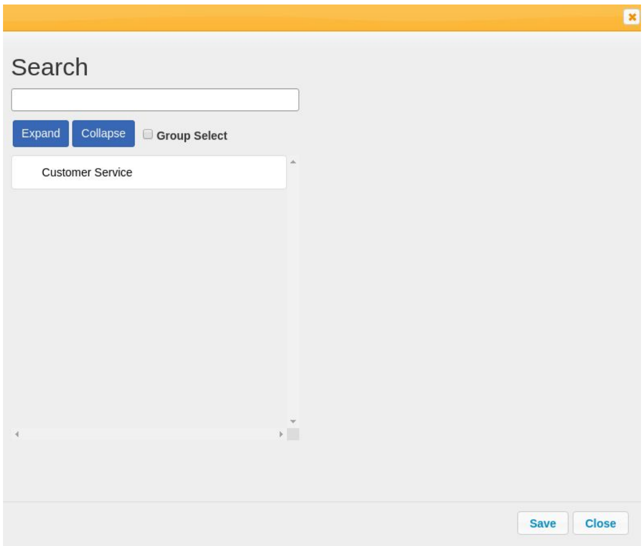
14. Click the “Caller ID” input box. A dropdown list will appear with available numbers created in the Dialplan section. (See Dialplan section for more information).
15. Click the “Transfer String” input box, type a transfer string:

    (SIP/operator name used / number to be transferred)
16. In the “Answered By,” input box type the desired user’s name.
17. Click the “Diversion Code” dropdown box, type the diversion code. (Code provided by the Telco operator, so that the customer’s actual phone number can be displayed, if desired the Call Center Studio Development team can prepare this).

18. In the “Email” input box, type the desired email addresses to receive notifications regarding the transfer step of the IVR.

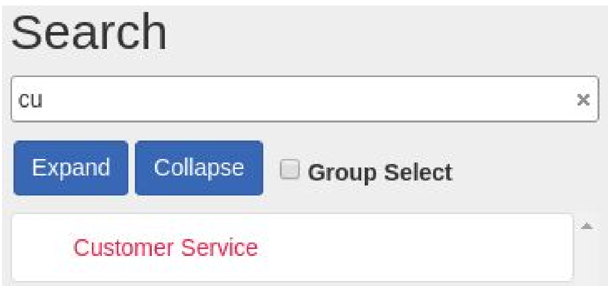
19. If a tag is desired, click the Select button, 

to the right of the “Tag” input box, the following pop-up window will appear:



20. Search for a Tag using the “Search” input box shown below:

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



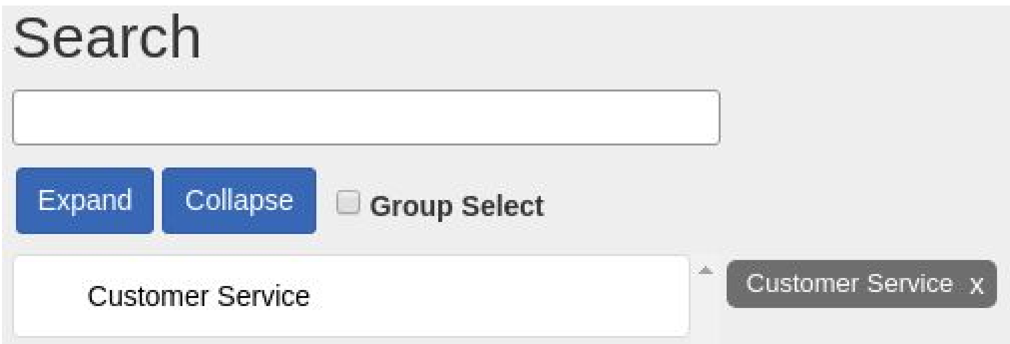
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

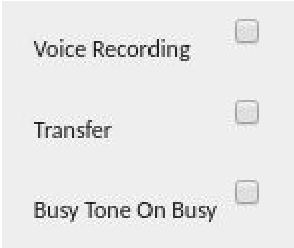
Check the Group Select Checkbox, Group Select *, to group select tags.*

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the "X," x*, to the right of the tag name.*

21. Below the tag's input box, the following four checkboxes are displayed:



The descriptions of these checkboxes are explained below:

Voice Recording	If checked, records the IVR
Transfer	Used by the Call Center Studio Development Team (Do not check)
Busy Tone on Busy	It creates a busy tone for the transferee when the person transferred to is on the other line.

22. Click the save button, 

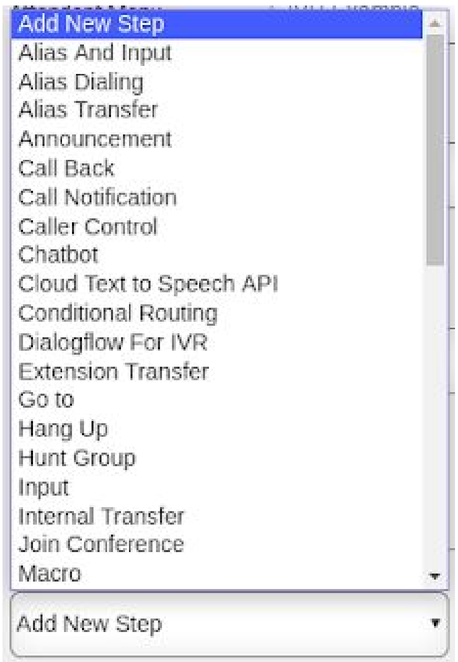
.

Adding Transfer to Last User Step

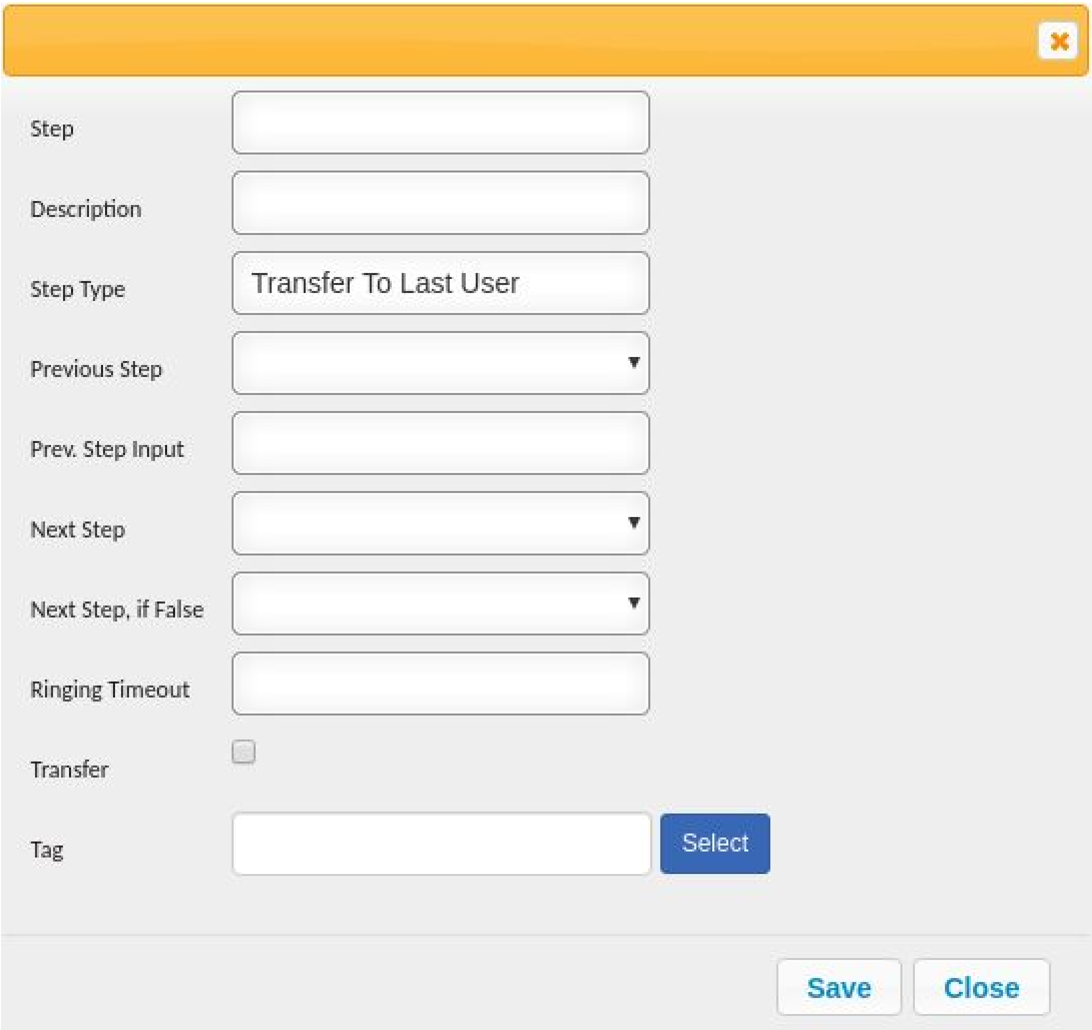
The step is used to transfer to the last user without switching to a different step. In cases where the last customer representative is not active, the call is terminated if the next step is not defined, and if defined, it is directed to the selected step. If the caller number has not been connected to a customer representative before, if the call control is wrong, it relates to the next step. If the call cannot be answered by the last user during the ring time, it is transferred to the next step.

1. Click the “Add New Step” dropdown box, 

, the following list will appear:

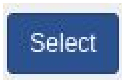


2. Select the "Transfer To Last User" step the following pop-up window will appear:

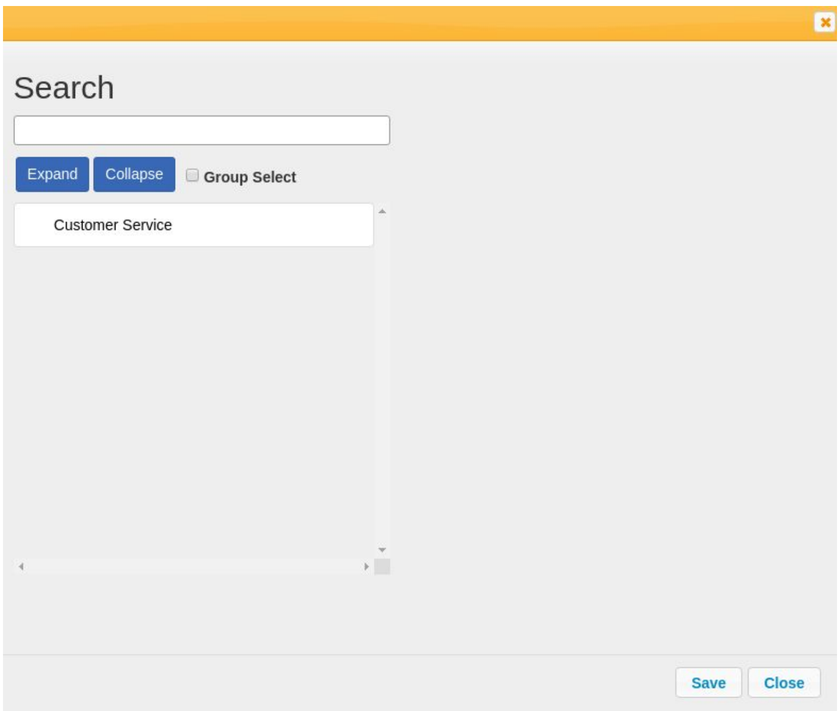


3. Click the "Step" input box, type the desired step name. An example is shown below:

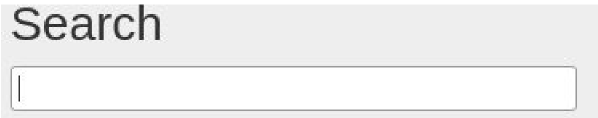
4. If desired in the "Description" input box, type a description for the step.
5. In the "Previous Step" dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.

6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. In the “Next Step if False” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
9. In the “Ringing Timeout” input box, type the desired ringing Timeout (Seconds).
10. Do not check the “Transfer” checkbox (Used only by the Call Center Studio Development Team).
11. If a tag is desired, click the Select button, 

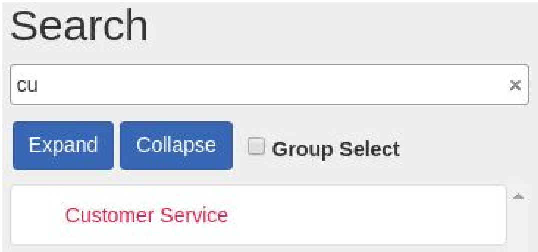
to the right of the “Tag” input box, the following pop-up window will appear:



12. Search for a Tag using the "Search" input box shown below:



Note: Partial Tag names can be used for searching purposes all tags with the partial name will have their name appear in red font as shown below:



Note:

Press the Expand button, 

, to expand the selection

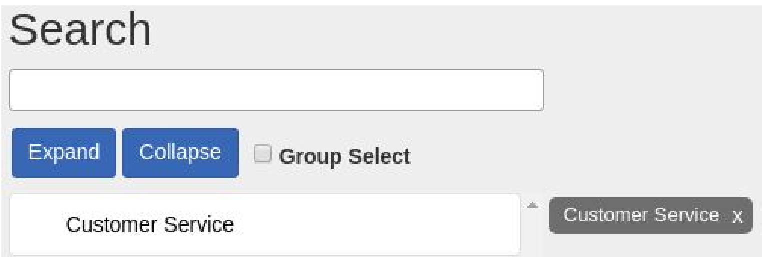
Press the Collapse button, 

, to collapse the selection

Check the Group Select Checkbox, 

, to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the "X," 

, to the right of the tag name.

13. Click the save button, 

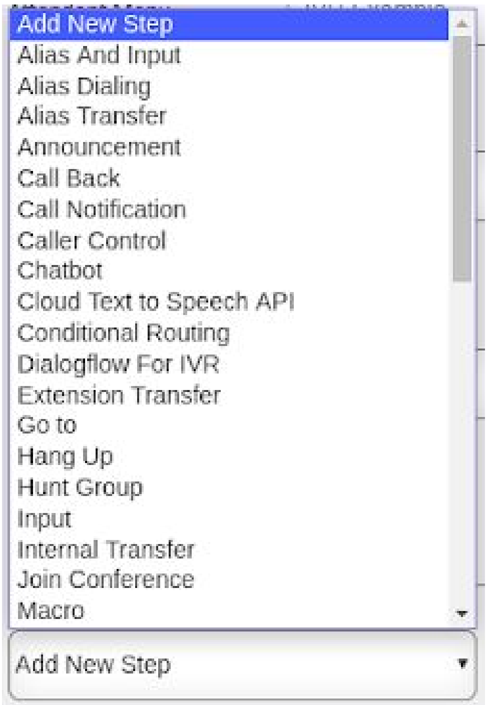
.

Adding User Transfer Step

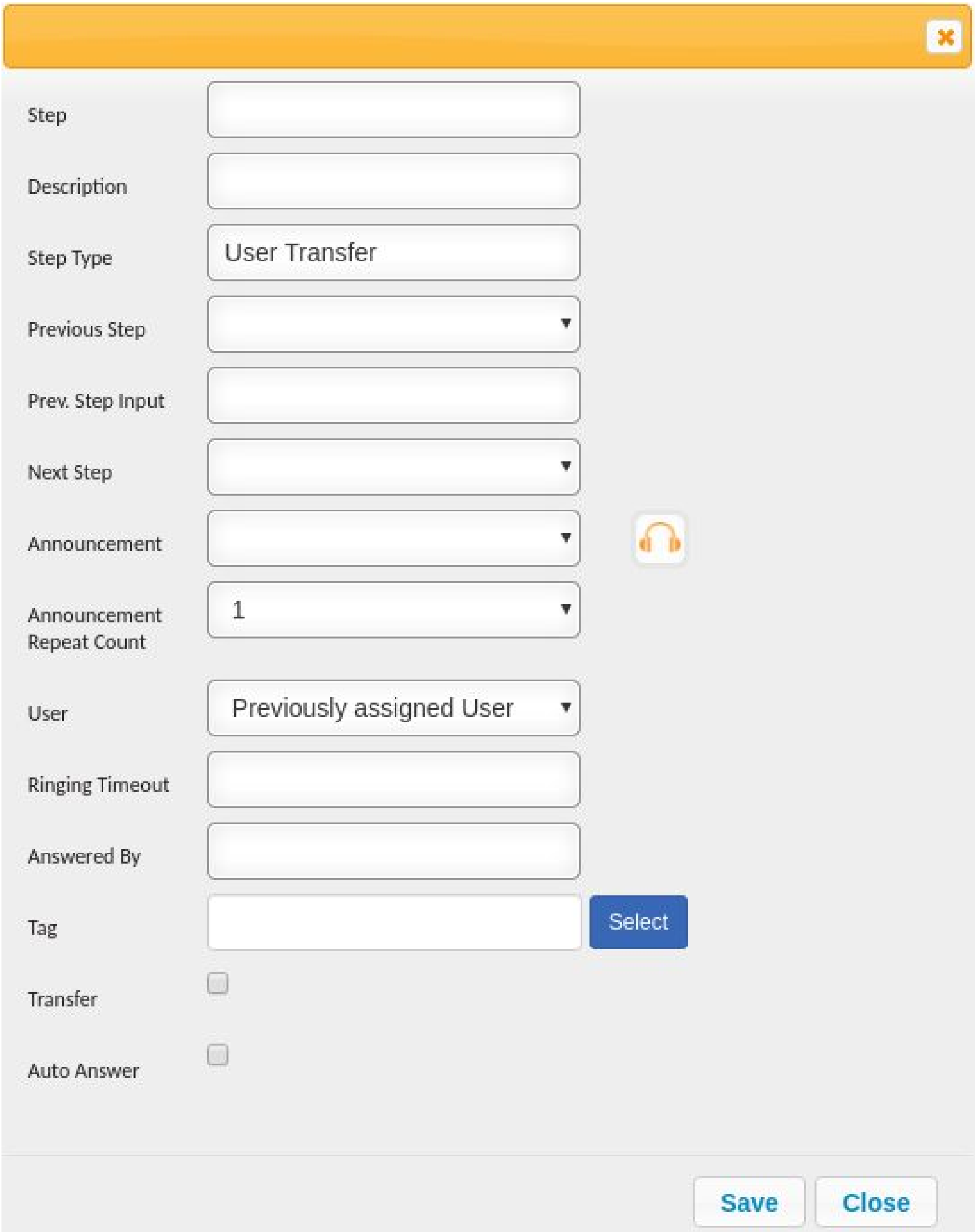
It is used to ensure that incoming calls are transferred to the selected user without being assigned to a particular queue. For calls to arrive, the Agent does not need to switch to "available" status, it is sufficient to have default or custom status. If the user is not in the system at the time of the call, the call is transferred to the next step. If the next step is not selected, the call is automatically closed by the system.

1. Click the "Add New Step" dropdown box, 

, the following list will appear:

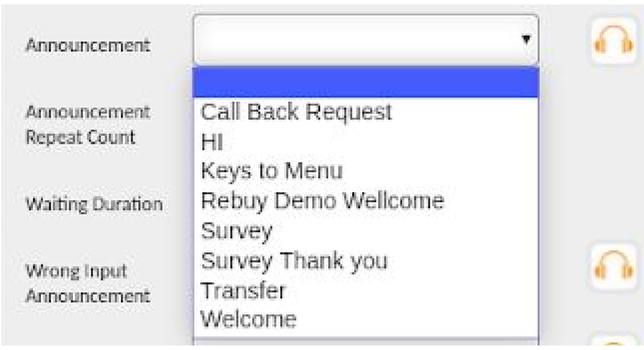


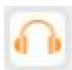
2. Select the “User Transfer” step the following pop-up window will appear:



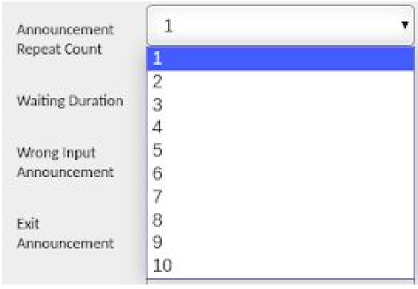
3. Click the “Step” input box, type the desired step name. An example is shown below:

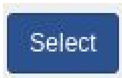
4. If desired in the "Description" input box, type a description for the step.
5. In the "Previous Step" dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the "Previous Step Input" input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer's numerical input).
7. In the "Next Step" dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the "Announcement" input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:



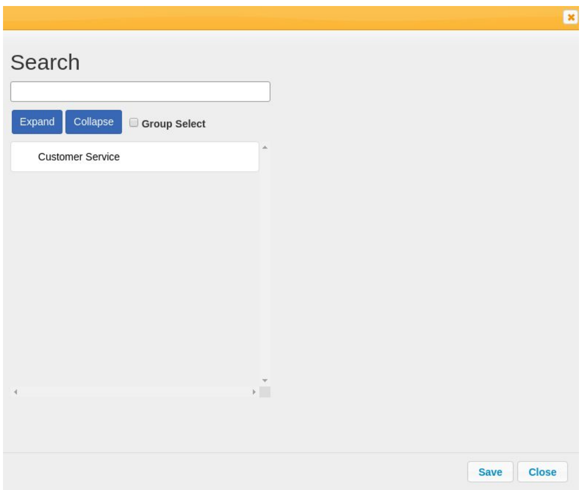
Note: Announcements can be listened to by clicking the following button,  *, located to the right of each Announcement dropdown list.*

9. Click the “Announcement Repeat Count” input box the following dropdown list will appear:



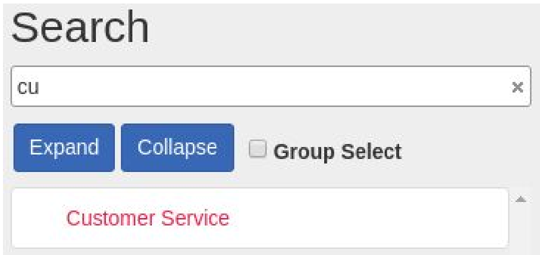
10. Select the desired repeat count.
11. In the “User” dropdown list, select the desired agent to transfer to, or select previously assigned user (used to route the call back to the agent that the customer was previously speaking to).
12. In the “Ringing Timeout” input box, type the desired ringing Timeout (Seconds).
13. Check the “Transfer” checkbox if desired.
14. In the “Ringing Timeout” input box, type the desired ringing Timeout (Seconds).
15. If a tag is desired, click the Select button, 

to the right of the “Tag” input box, the following pop-up window will appear:



16. Search for a Tag using the “Search” input box shown below:

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



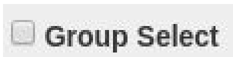
Note:

Press the Expand button, 

, to expand the selection

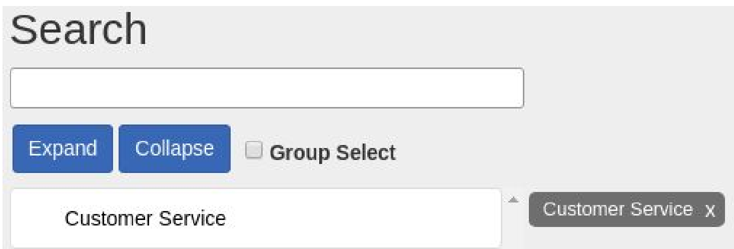
Press the Collapse button, 

, to collapse the selection

Check the Group Select Checkbox, 

, to group select tags.

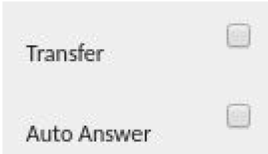
Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the “X,” 

, to the right of the tag name.

17. Below the tag's input box, the following two checkboxes are displayed:



The descriptions of these checkboxes are explained below:

Transfer	Used by the Call Center Studio Development Team (Do not check)
Auto Answer	When transferred allows the user to answer automatically without chafing to click the answer button.

18. Click the save button, 

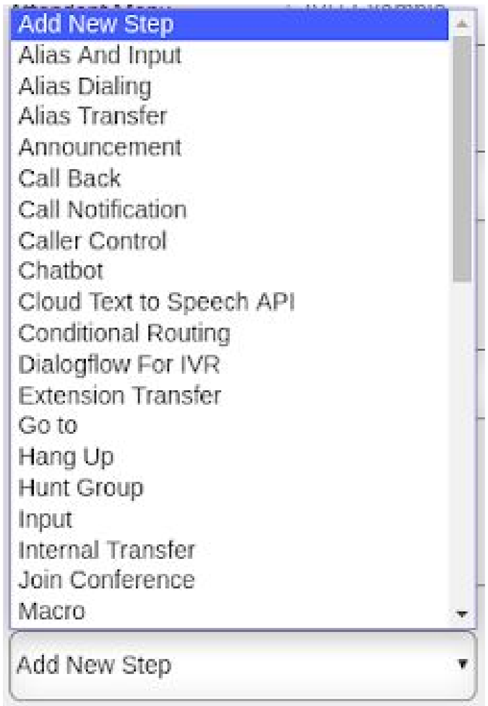
.

Adding Voicemail Step

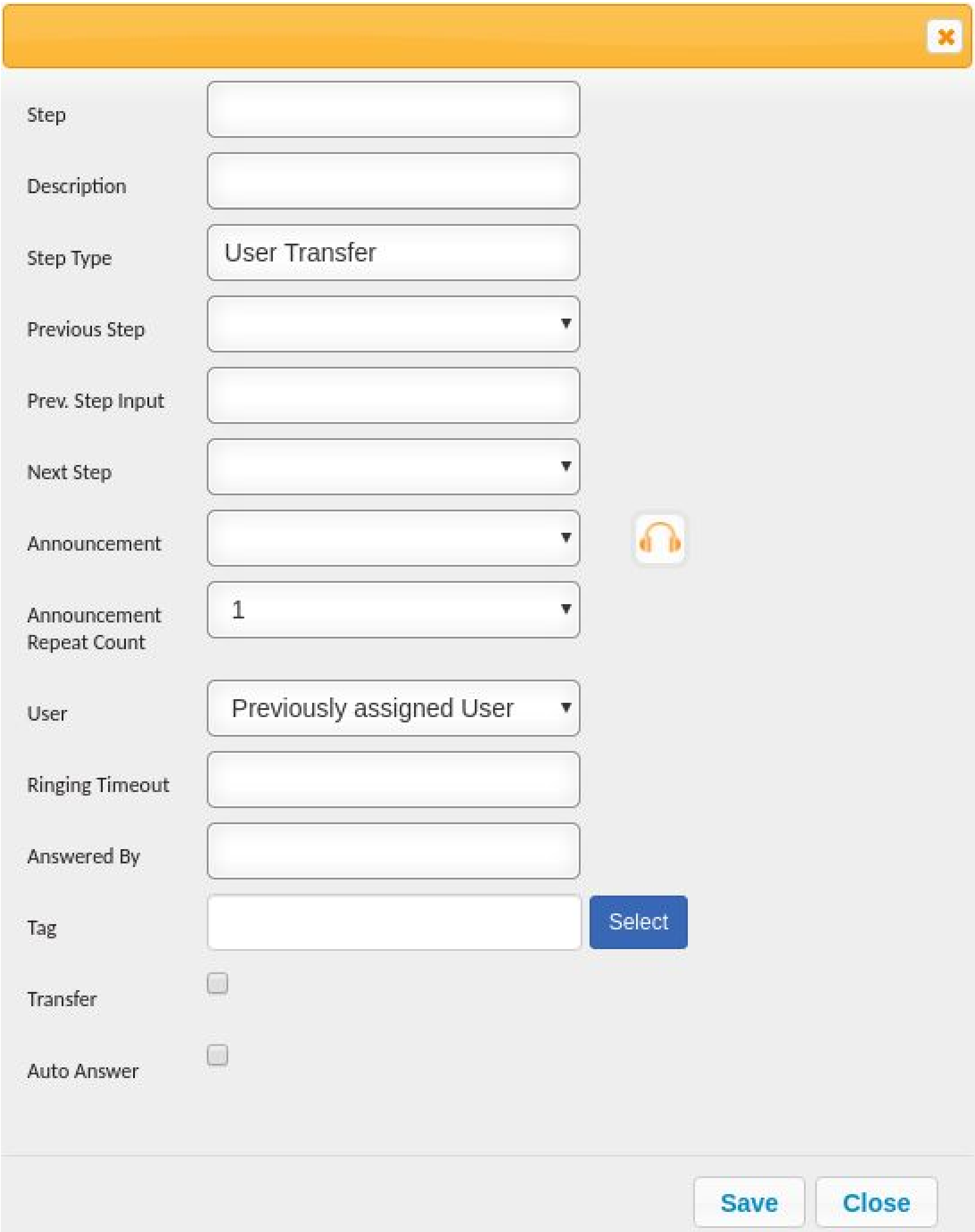
When incoming calls are forwarded to this step, voicemails are sent to the specified email address.

1. Click the "Add New Step" dropdown box, 

, the following list will appear:

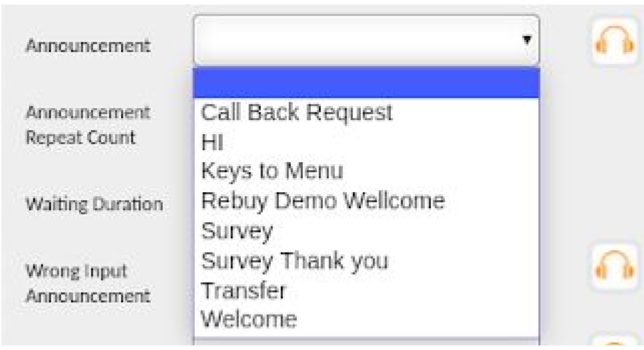


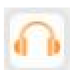
2. Select the "User Transfer" step the following pop-up window will appear:

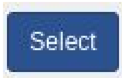


3. Click the “Step” input box, type the desired step name. An example is shown below:

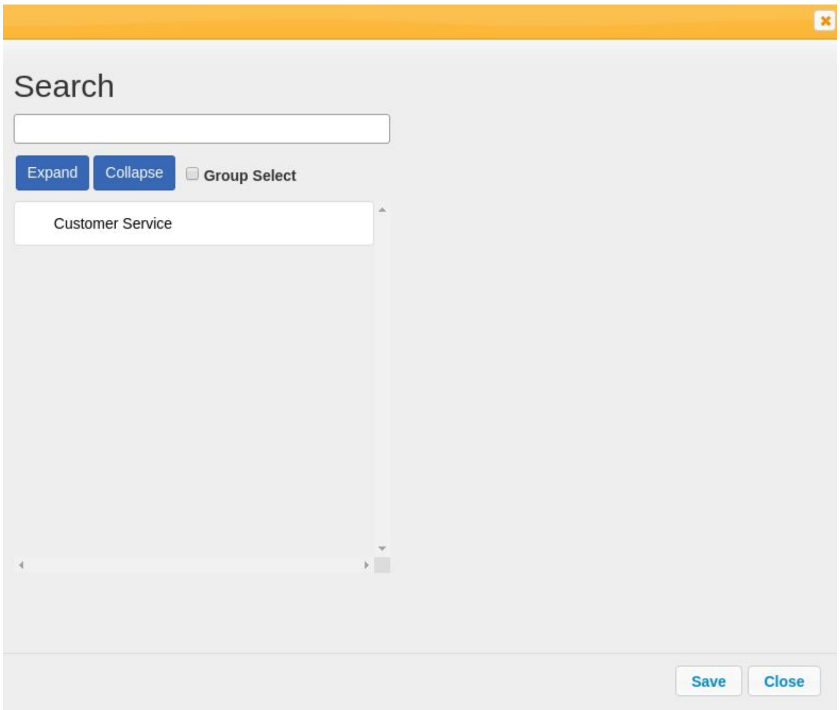
4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:



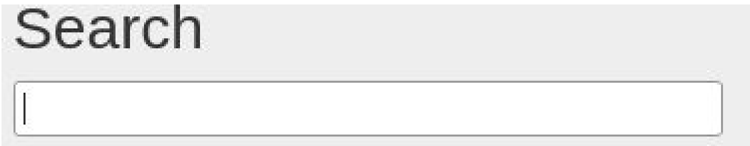
Note: Announcements can be listened to by clicking the following button,  *, located to the right of each Announcement dropdown list.*

9. In the “Email” input box, type the desired email that the callback request will be sent to. (Note: multiple emails can be inputted using a comma, “,” to separate them. If the number of emails is over five, a group email is recommended to allow for successful email delivery.)
10. In the “Input Timeout,” input box type select the timeout duration for the customer input (Seconds).
11. Check the “Exit on DTMF input” checkbox if desired. (When selected allows the customer to choose any number to end the call)
12. If a tag is desired, click the Select button, 

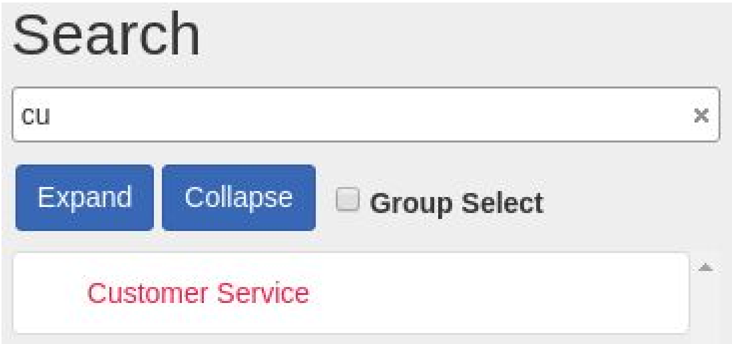
to the right of the “Tag” input box, the following pop-up window will appear:



13. Search for a Tag using the “Search” input box shown below:



Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



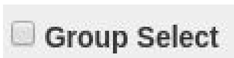
Note:

Press the Expand button, 

, to expand the selection

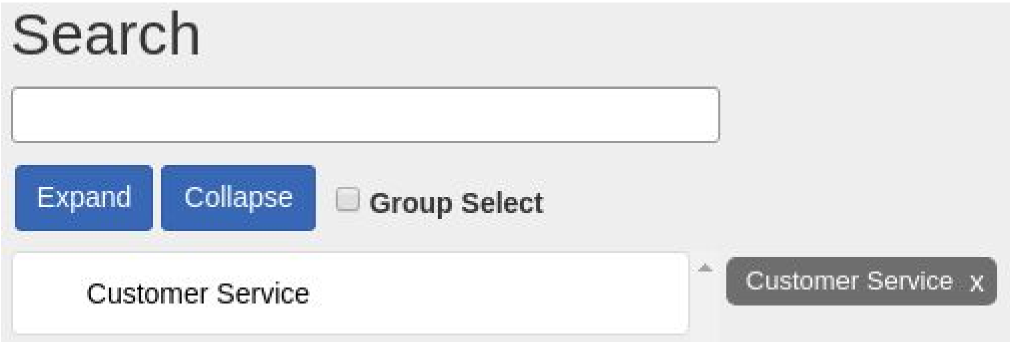
Press the Collapse button, 

, to collapse the selection

Check the Group Select Checkbox, 

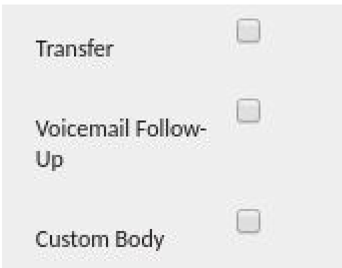
, to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the "X," x, to the right of the tag name.

14. If desired, click the "Custom Subject" input box type the desired subject for the voicemail email notification.
15. Below the Custom Subject input box, the following checkboxes are displayed:



The descriptions of these checkboxes are explained below:

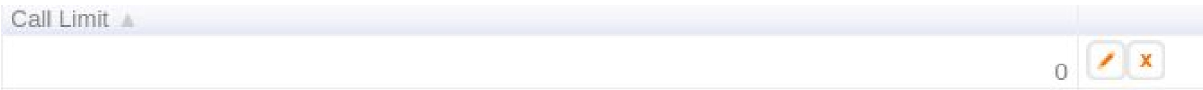
Transfer	Used by the Call Center Studio Development Team (Do not check)
Voicemail Follow-Up	When checked, the following input box will be displayed:  Type the desired control time. Follow-up will be initiated after the control time has passed.
Custom Body	If checked, the custom body input box will be displayed. Type the desired custom email body message.

16. Click the save button, 

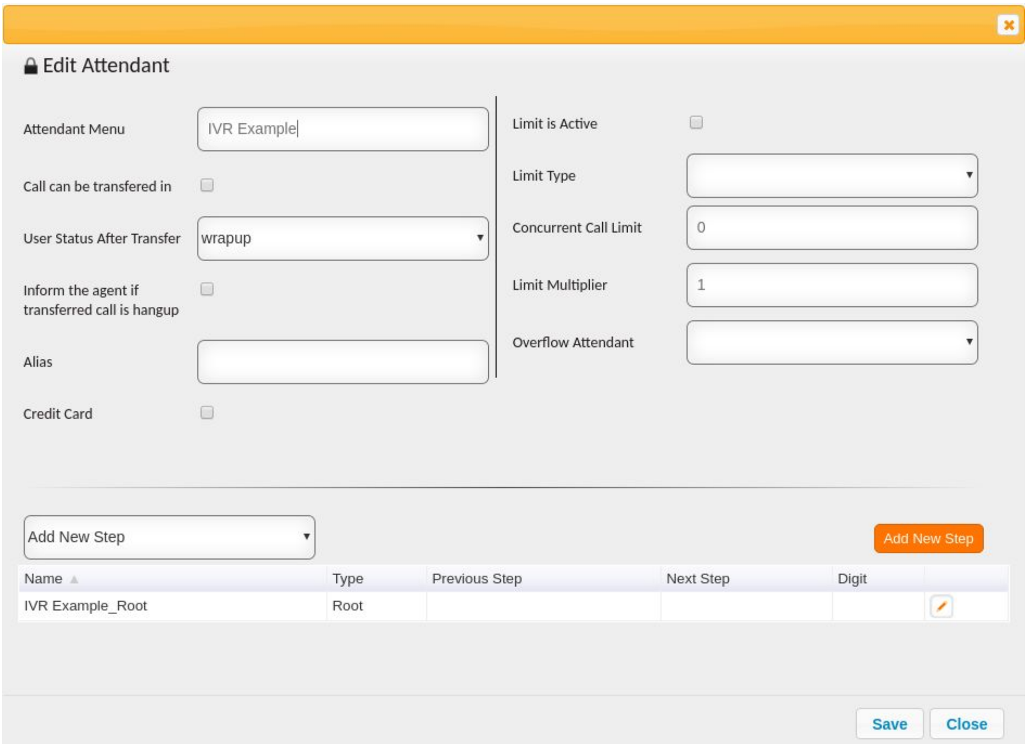
.

Editing an IVR

1. To edit an IVR, click the edit button, , located on the far right of the IVR name after the "Call Limit" column as shown below:



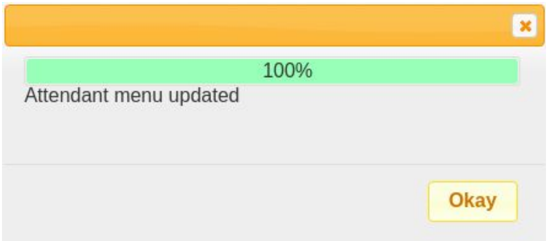
After clicking the edit button, the IVR window will appear as shown:

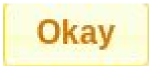


2. Make changes as desired.

3. Once the desired changes have been completed, the information can be saved by clicking the save button, 

, the following pop-up box will appear:

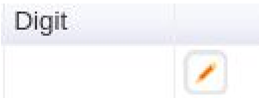


4. Click the Okay button, 

, to confirm the changes

Editing an IVR Step

1. After opening the IVR using the "Editing an IVR" instructions, click the edit button, , located on the far right of the IVR step name after the "Digit" column as shown below:

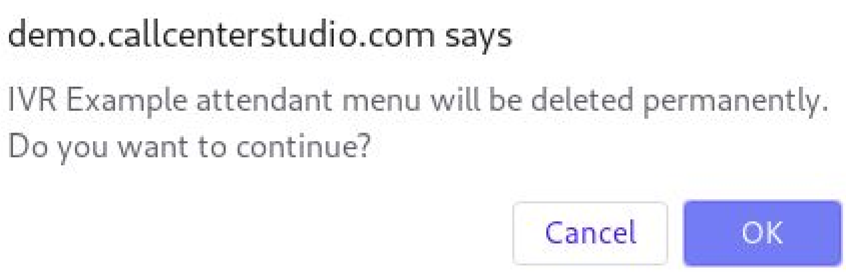


2. Make changes as desired.
3. Click the save button, 

.

Deleting an IVR

1. From the Attendant Name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- *Select the cancel button, , to cancel the deletion.*
- *Select the OK button, , to confirm the deletion.*

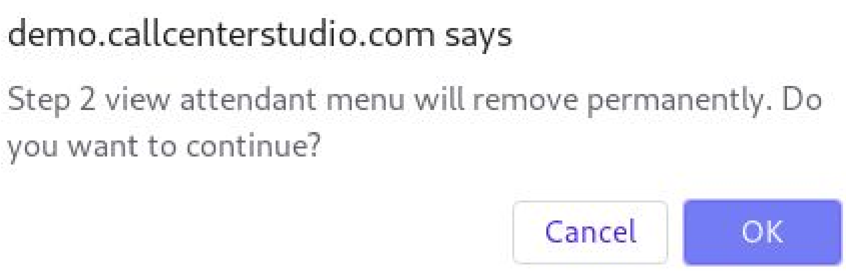
2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted incoming chat will not be shown.

Deleting an IVR Step

Note: The Root Step of any IVR cannot be deleted.

1. From the IVR step list within a selected IVR, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



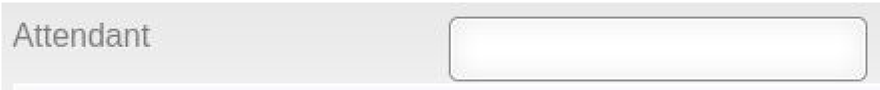
- *Select the cancel button, , to cancel the deletion.*
- *Select the OK button, , to confirm the deletion.*

2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted incoming chat will not be shown.

Searching for an IVR Step

1. Click the "Attendant" input box, type the IVR's name, the input box is shown below:



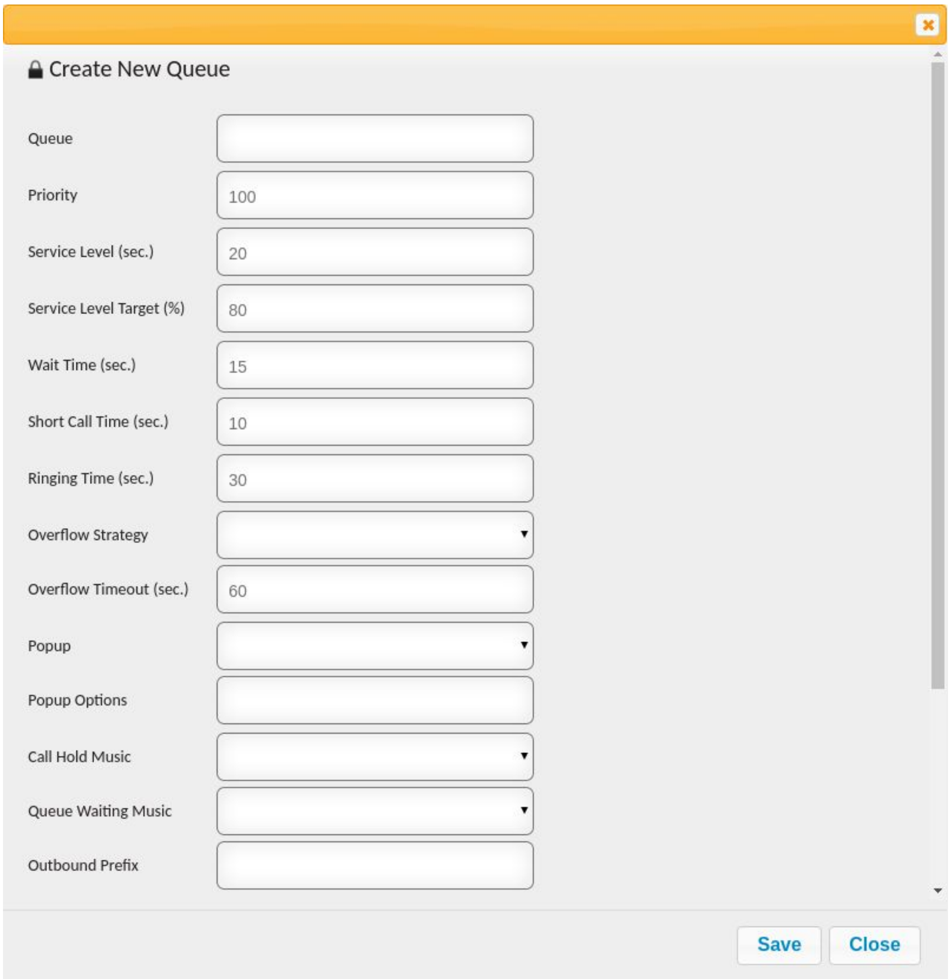
Note: Partial names can be used when spelled correctly.

Queues

The queues section is where agent queues can be created, edited, and deleted.

Creating a Queue

1. Click the new button, , in the top right corner the following pop-up screen will appear as shown below:



1. In the “Queue” input box, type the desired name for the queue.
2. In the “Priority” input box type the desired priority level for the queue. For example, a queue with a priority of 100 will receive top priority for calls, whereas a lower priority number would not.

3. In the “Service Level (sec)” input box type, the desired time frame for the target service level (answered calls/total calls) to be calculated. The default Service Level is shown below:

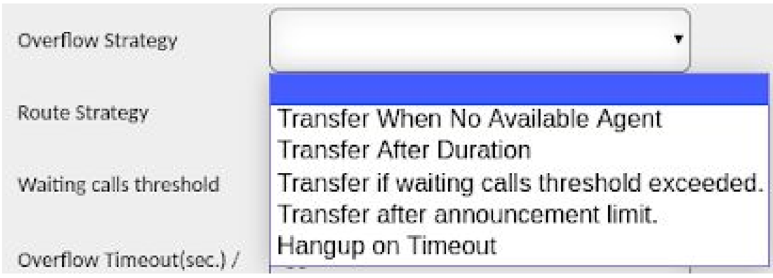
4. In the “Service Level Target (%)” (answered calls / total calls) type, the desired service level target percentage. (Default is 80% meaning the target is to answer 80% of the incoming calls within the Service Level (sec) period) . The default is shown below:

5. In the “Wait time (sec)” type, the desired wait time. (Wrap-up time frame for agent)

6. The “Short Call Duration (sec)” type the desired time used for calculating whether the call is a short call or not. The default time is shown below:

7. In the “Ringing Timeout (sec)” type, the desired ringing timeout. The default time is shown below:

8. In the “Overflow Strategy” dropdown box select from the following options:



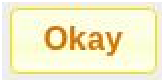
9. In the “Overflow Timeout (sec)” type, the desired timeout time.
10. In the “Popup” dropdown box, if desired, a popup can be added to the queue (See the Web URLs section for creating a selection for a popup).
11. In the “Popup Options” input box, select the desired popup option. (Created using Web URLs section of the tenant)
12. In the “Call Hold Music,” dropdown box select the desired call hold music. (Hold music can be added upon request to the Call Center Studio Team)
13. In the “Queue Waiting Music” dropdown box, select the desired queue waiting music. (Hold music can be added upon request to the Call Center Studio Team)
14. In the “Outbound Prefix” input box type, a unique number for the outbound prefix (Note: can be any number combination not used on another queue outbound prefix).

15. In the "Dialplan" dropdown box, select the desired Dialplan (See Dialplans section for creating a dial plan).
16. Below the "Dialplans" dropdown box, the following checkboxes can be selected. Their definitions are listed below:

Default	When selected, the agent has to choose the answer button to answer the call.
Auto Answer	When selected, the agent does not have to click the answer button; the call is auto answered.
Tell Queue Order	When selected, the queue order of the caller is announced in the queue every few seconds.

17. Click the save button, 

. The following pop-up window will appear:

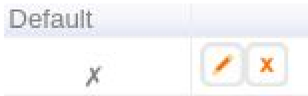
18. Click the okay button, 

, the newly created queue will be found in the queue list.

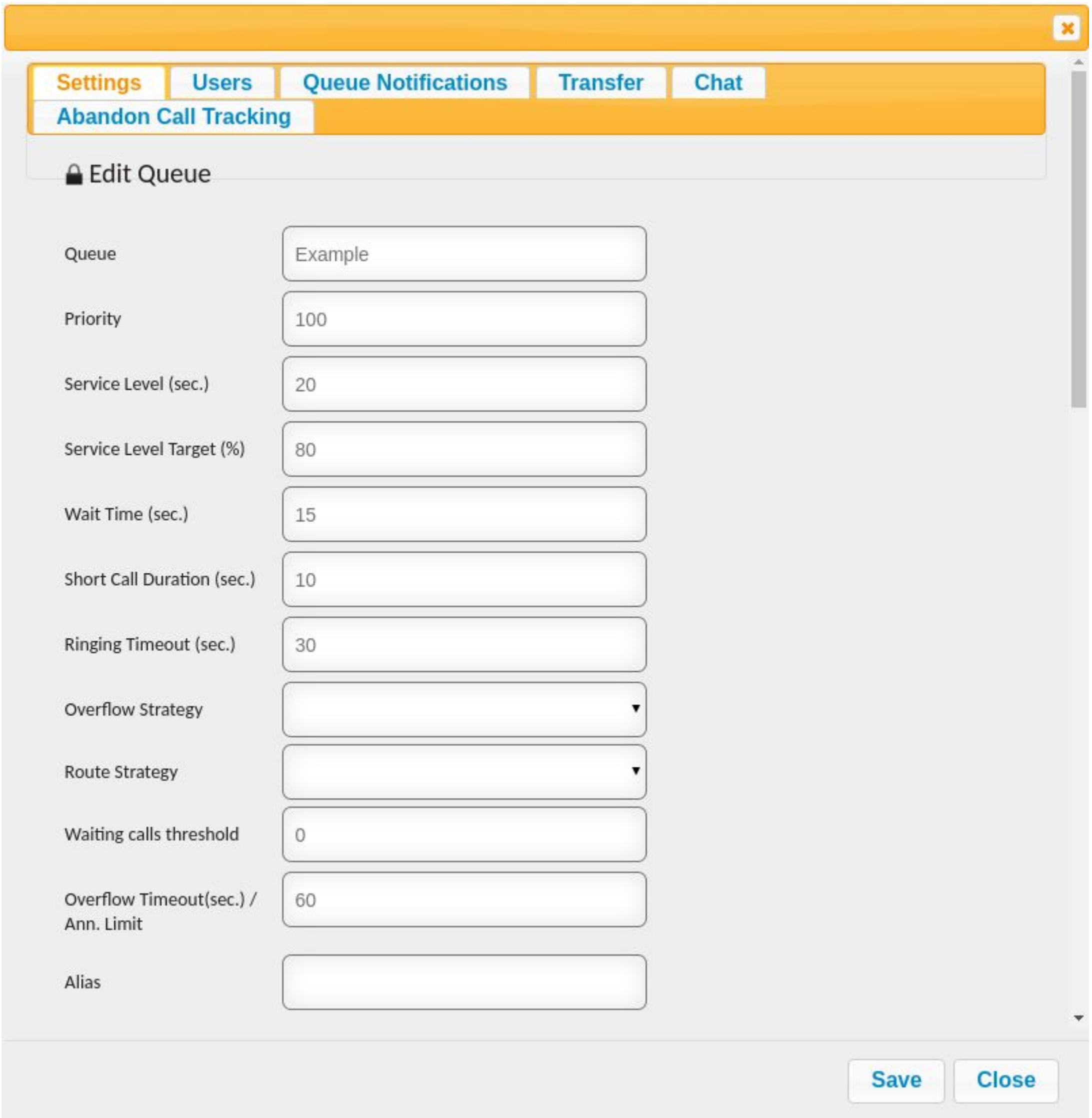
(Note: For more advanced queue settings see below, Editing a queue section for more information)

Editing a Queue

1. To edit a queue, click the edit button, , located on the far right of the IVR name after the "Default" column as shown below:



After clicking the edit button, the queue window will appear as shown:



The following tabs listed at the top of the pop-up window are explained in detail below:

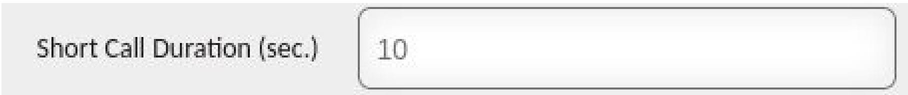
Settings Tab

1. In the “Queue” input box, type the desired name for the queue.
2. In the “Priority” input box type the desired priority level for the queue. For example, a queue with a priority of 100 will receive top priority for calls, whereas a lower priority number would not.
3. In the “Service Level (sec)” input box, type the desired time frame for the target service level (answered calls/total calls) to be calculated. The default Service Level is shown below:

4. In the “Service Level Target (%)” (answered calls / total calls) type, the desired service level target percentage. (Default is 80% meaning the target is to answer 80% of the incoming calls within the Service Level (sec) period) . The default is shown below:

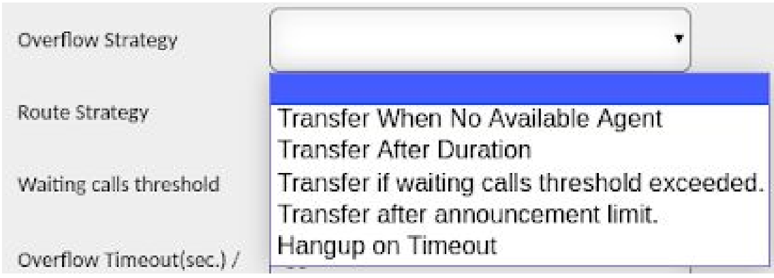
5. In the “Wait time (sec)” type, the desired wait time. (Wrap-up time frame for agent)

6. The “Short Call Duration (sec)” type the desired time used for calculating whether the call is a short call or not. The default time is shown below:



7. In the “Ringing Timeout (sec)” type, the desired ringing timeout. The default time is shown below:

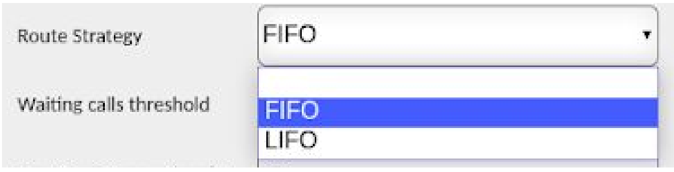
8. In the “Overflow Strategy” dropdown box, select from the following options:



The following overflow strategies are explained in detail below:

Transfer When No Available Agent	Transfers when no available agent is available.
Transfer After Duration	Transfers call after duration.
Transfer if the waiting calls threshold exceeded.	Transfers waiting calls if the threshold is exceeded.
Transfer after the announcement limit.	Transfers call after the announcement limit.
Hangup on Timeout	Hangup calls after the timeout.

9. In the “Route Strategy” dropdown box, select from the following options:



The following overflow strategies are explained in detail below:

FIFO	Calls are held in the queue and answered based on a First In First Out strategy.
LIFO	Calls are held in the queue and answered based on a Last In First Out strategy.

10. In the “ Waiting Calls Threshold” input box, type the desired waiting calls threshold.
11. In the “Overflow Timeout(sec.) / Ann. Limit” input box, type the desired input.
12. In the “Alias” input box, if desired, an alias number (extension) can be assigned to the queue.
13. In the “Popup” dropdown box, if desired, a popup can be added to the queue (See the Web URLs section for creating a selection for a popup).
14. In the “Popup Options” input box, type the desired popup option.
15. In the “Ringing Trigger” dropdown box, if desired, a popup can be added to the queue as a ringing trigger (See the Web URLs section for creating a selection for a popup).

16. In the “No Answer Trigger” dropdown box, if desired, a popup can be added to the queue as a no answer trigger (See the Web URLs section for creating a selection for a popup).
17. In the “Hangup Trigger” dropdown box, if desired, a popup can be added to the queue as a hangup trigger (See the Web URLs section for creating a selection for a popup).
18. In the “When Call Enters Queue” dropdown box, if desired, a popup can be added to the queue. When the call enters the queue it would be triggered (See the Web URLs section for creating a selection for a popup).
19. Below the “When Call Enters Queue” dropdown box, the following checkboxes can be selected:

The checkbox descriptions are defined below:

Trigger Popup As Service	This setting is used when the CRM is not browser-based.
Open in The Same Popup	Opens pop-up in a new tab.
Send Popup Event	Sends all pop-ups from the queue to the browser as an event message.

20. In the “Call Hold Music,” dropdown box select the desired call hold music.
21. In the “Queue Waiting Music” dropdown box, select the desired queue waiting for music.
22. In the “Outbound Prefix” input box, type the desired outbound prefix. (Can be any number, but the same number cannot be used in different queues)
23. The following checkboxes can be selected if desired. They are explained below:

Default	Makes the queue the default queue when checked.
Auto Answer	When checked, during an incoming call, the agent does not have to select “Answer” to be connected with the customer.

24. In the “Auto Answer Delay(sec)” dropdown box, if the “Auto Answer” checkbox is checked, select the desired time delay for the auto-answer.
25. Check the “Tell Queue Order” checkbox if desired. (Tells the customer there queue number)
26. In the “Tell Queue Order Repeat Period(s)” input, if the “Tell Queue Order” checkbox was checked, type the desired time in seconds for the queue number to be repeated to the customer.

27. In the “Upper Limit For Queue Order” input box, if the “Tell Queue Order” checkbox was checked, this input box allows an upper limit to be placed on the queue order. For example, 60 customers could be waiting in a queue, but if the “Upper Limit For Queue Order” number is 20, the max number that will be announced to the customer will be 20.
28. In the “Wrapup Codes” dropdown box, a wrapup code can be selected as a default for each call within the queue, if desired.
29. Below the “Wrapup Codes” dropdown box, the following checkboxes can be selected. They are explained below:

Ask Wrapup Code	If checked, a pop-up window will appear, allowing the agent to select a wrapup code for the call.
Do Not Ask Wrapup Code For Unanswered Outgoing Calls	If check, the wrapup code pop-up window will not appear for unanswered outgoing calls.

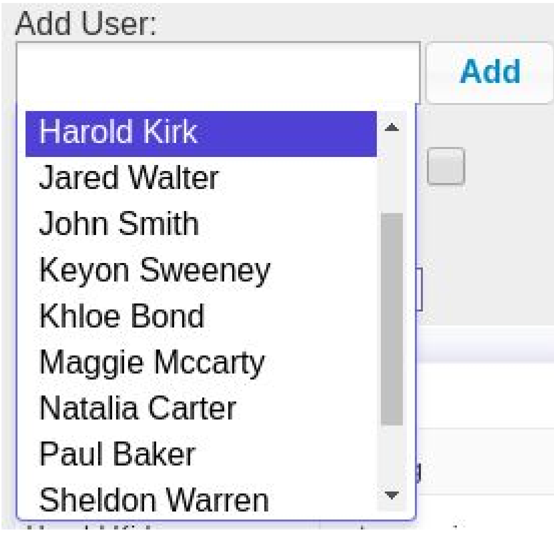
30. In the “Location” dropdown box, if locations were created, a location can be selected for the queue. (See more information in the “Location” section)
31. If desired, the “Play Agent Announcement On Call Connected” checkbox can be selected, which will play the Agent Announcement on the connected call.
32. Once the desired changes have been made, click the “Save” button, 

.

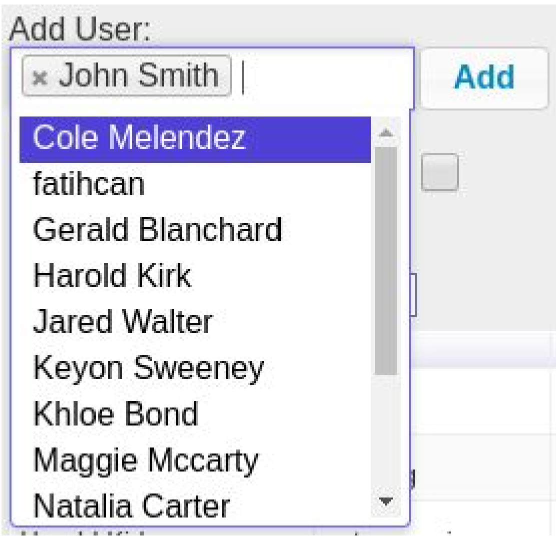
Users Tab

Adding a User to a Queue

1. Click the "Add User" input box, a dropdown list will appear with active users. An example is shown below:



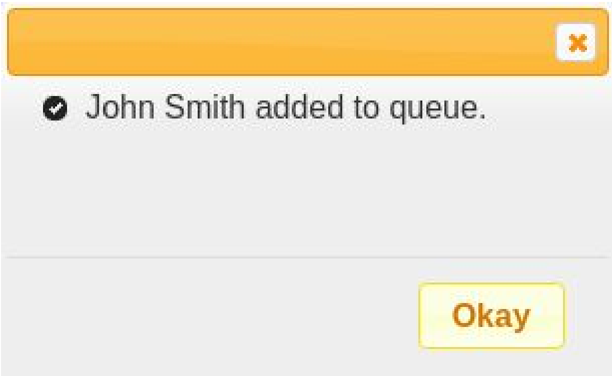
2. Use the scroll bar or directly type the user's name, then click the desired user. An example is shown below:



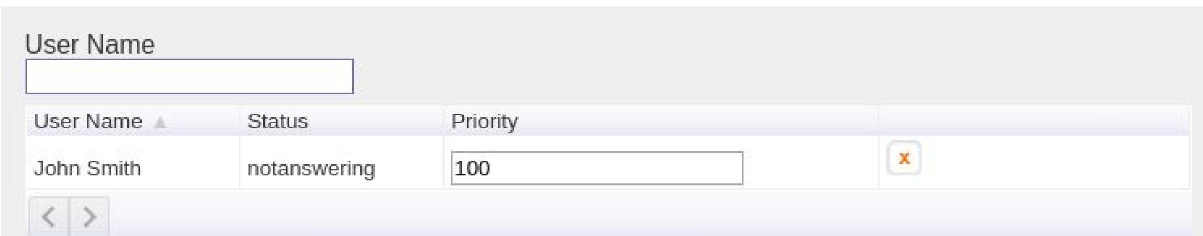
Note: Multiple users can be selected, as shown above, before adding them to the queue. To deselect a user, simply click the X, to the left of the user's name.

3. Click the "Priority" input box located to the right of the "Add User" input box, type the desired priority level. For example, a user with a priority of 100 will receive top priority for calls, whereas a lower priority number user would not. This feature is primarily used for skills-based routing.

4. After the desired user(s) have been selected, click the add button, Add. The following pop-up window will appear showing the added users:



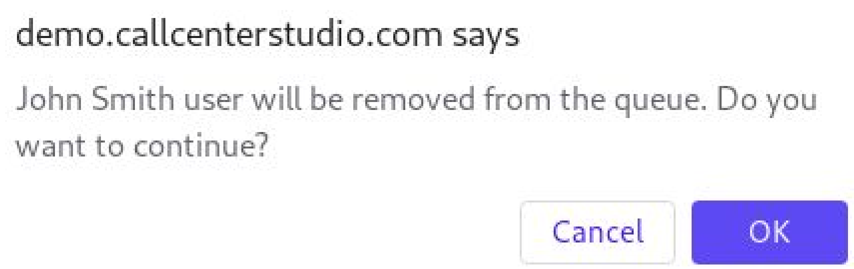
5. Click the okay button, Okay. The added user will appear in the user list, as shown below:



Note:

The priority Level for the user can be adjusted by clicking the "Priority" input box, located to the right of the user's status in the User Name list.

A user can be deleted From the User Name list by clicking the delete button,  *, located to the right of the user's priority level. When the delete button is clicked the following pop-up will appear:*



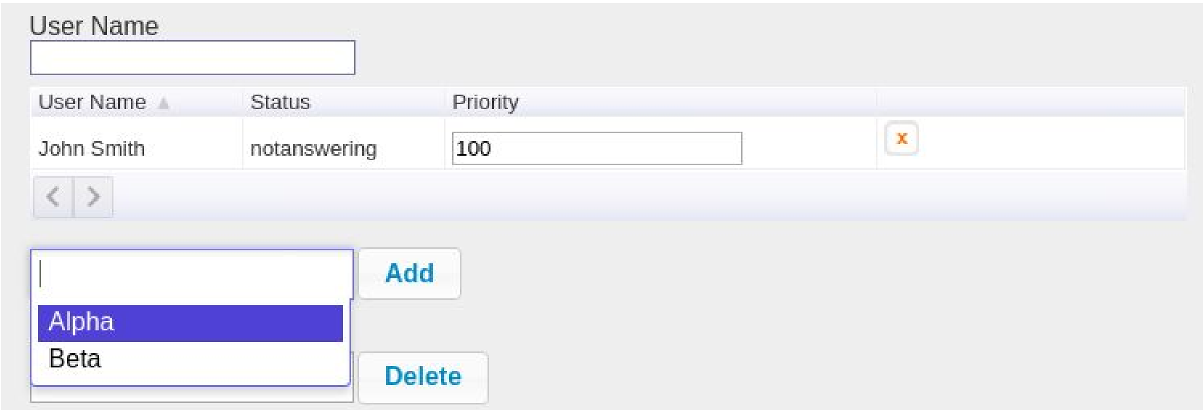
- *Select the cancel button,*  *, to cancel the deletion.*
- *Select the OK button,*  *, to confirm the deletion.*

Confirm the deletion by clicking the OK button,  *.*

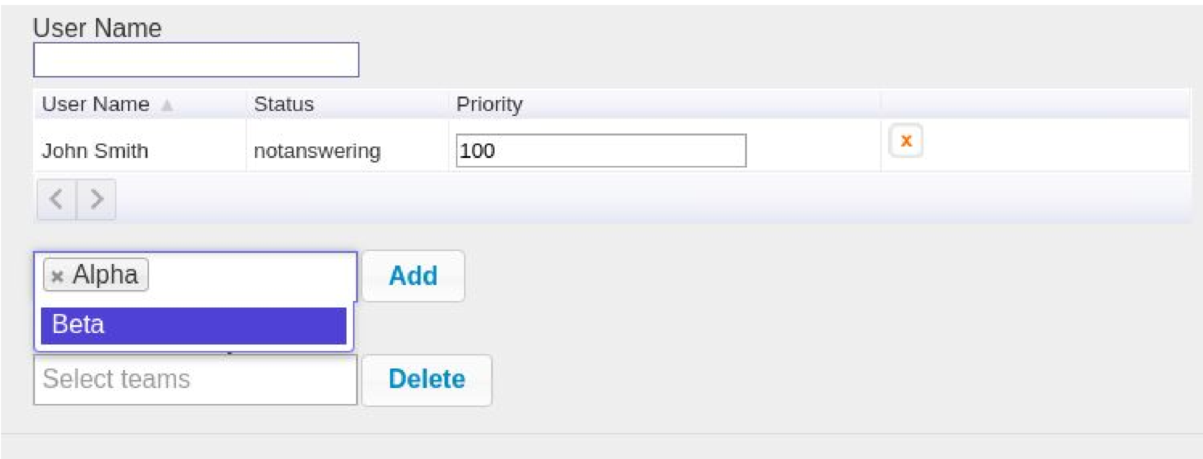
The screen will reload, and the deleted user will not be shown.

Adding a Team to a Queue

1. Click the "Add Team" input box. A dropdown list will appear with active teams. An example is shown below:

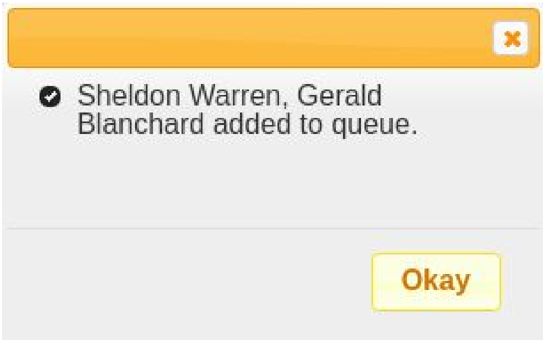


2. Use the scroll bar or directly type the team's name, then click the desired team. An example is shown below:

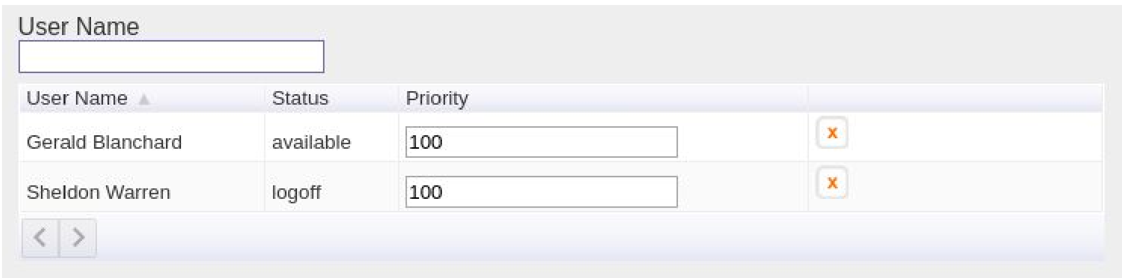


Note: Multiple users can be selected, as shown above, before adding them to the queue. To deselect a user, simply click the X,  *, to the left of the user's name.*

3. After the desired team(s) have been selected, click the add button, Add . The following pop-up window will appear showing the names of the team members that have been added as shown below:



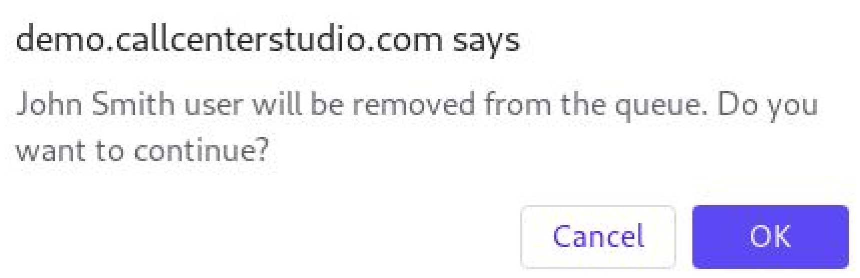
4. Click the okay button, Okay . The added users will appear in the user list, as shown below:



Note:

The priority Level for the users can be adjusted by clicking the "Priority" input box, located to the right of the user's status in the User Name list.

A user can be deleted From the User Name list by clicking the delete button, ×*, located to the right of the user's priority level. When the delete button is clicked, the following pop-up will appear:*



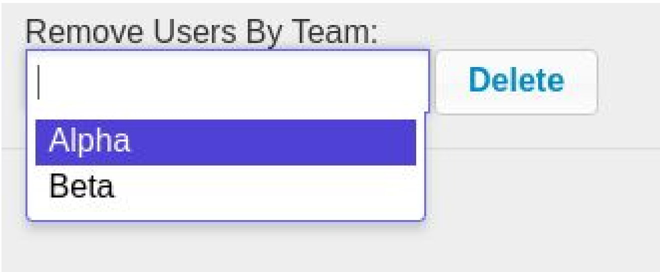
- *Select the cancel button,* Cancel *, to cancel the deletion.*
- *Select the OK button,* OK*, to confirm the deletion.*

Confirm the deletion by clicking the OK button, OK.

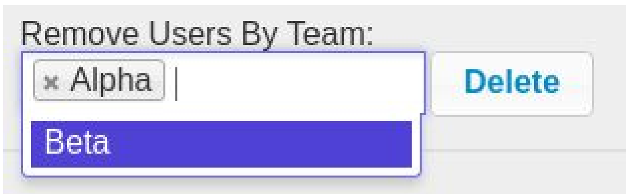
The screen will reload, and the deleted user will not be shown.

Removing Users by Team from a Queue

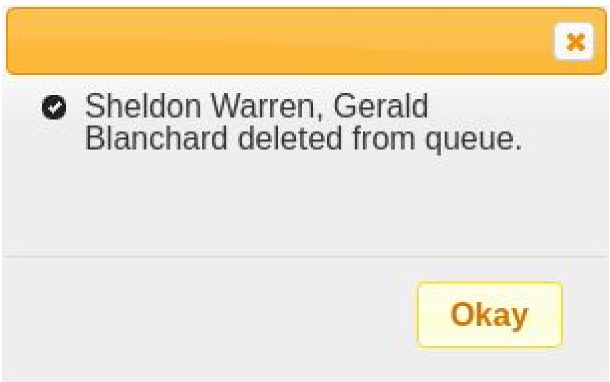
1. Click the "Remove Users By Team:" input box, a dropdown list will appear with active teams. An example is shown below:



2. Use the scroll bar or directly type the team's name, then click the desired team. An example is shown below:



3. After the desired teams have been selected, click the delete button,  , The following pop-up window will appear showing the deleted users:



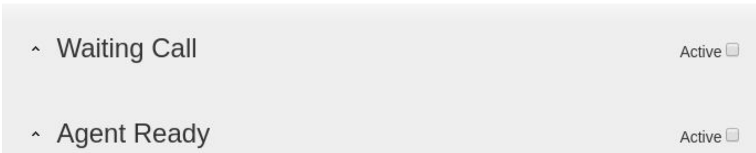
4. Click the okay button, Okay . The removed users will be removed from the User Name List.

Notifications Tab

The notifications tab is used to disseminate notifications to agents based on Waiting Call or Agent thresholds being exceeded.

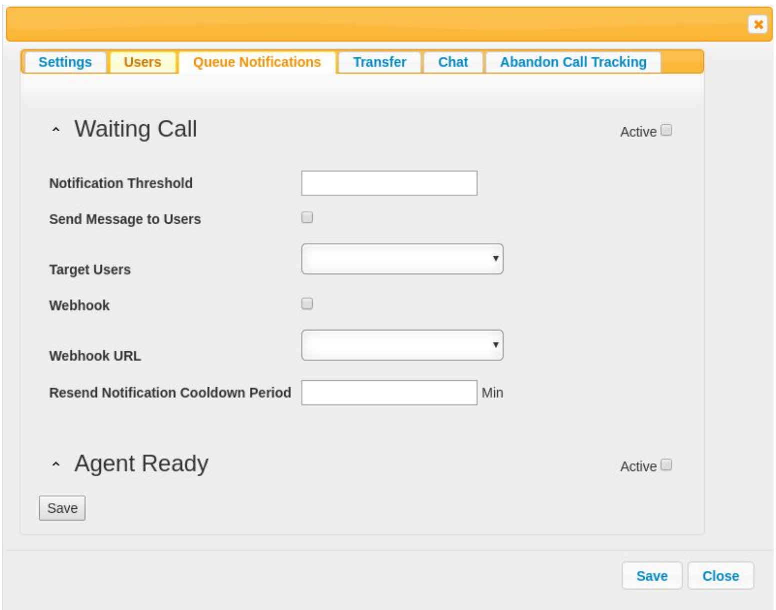
Note for any queue notification to occur using either the Waiting Call Notification or Agent Ready Notification, the Active checkbox, 

, must be checked. It is located to the right of each notification title, as shown below:

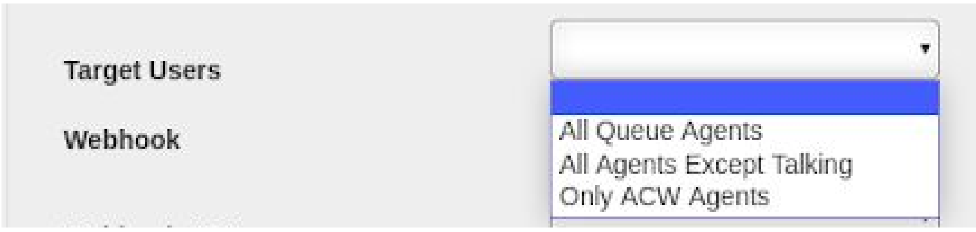


Waiting Call Notification

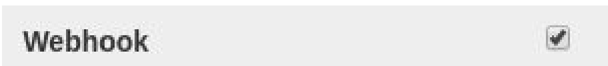
1. Click the chevron, , located to the left of "Waiting Call," the selection will expand as shown below:



2. Click the “Notification Threshold” type the desired number of waiting calls until the notification occurs.
3. If desired, click the “Send Message to Users” checkbox. (If checked, the agents will receive a notification regarding the waiting call threshold.
4. If the “Send Message to Users” checkbox is checked, the Target Users dropdown box can be clicked to choose which users to send the notification to. The following image shows the dropdown box options:

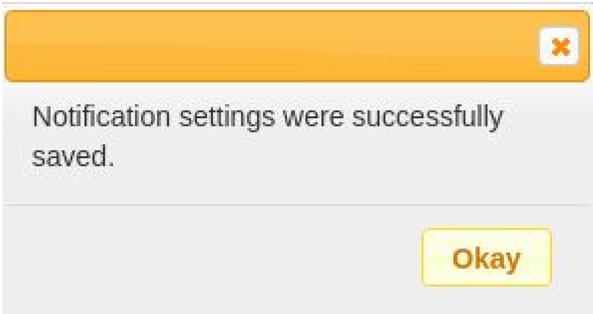


5. Select the desired option.
6. A webhook can be added to the waiting call notification. Check the “Webhook” checkbox, as shown below:



7. After the “Webhook” checkbox is checked, click the “Webhook URL” dropdown box, a list of available Webhook URL options is available (For creating additional options see the “Web URL” section).
8. In the “Resend Notification Cooldown Period” input box, type the desired time for the cooldown period (minutes).

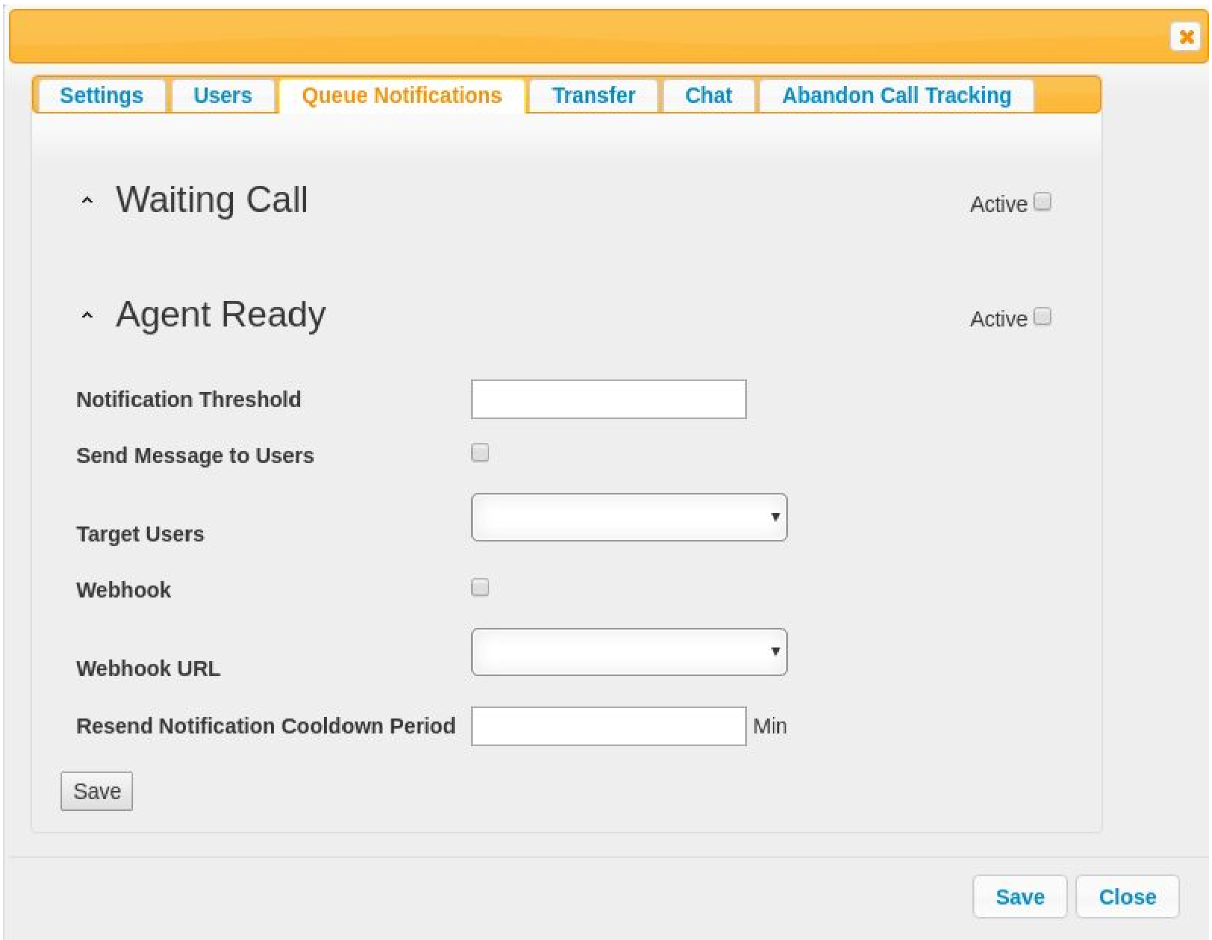
9. After Desired changes have been made, click the save button, Save, the following pop-up window will appear:



10. Click the Ok button, Okay.

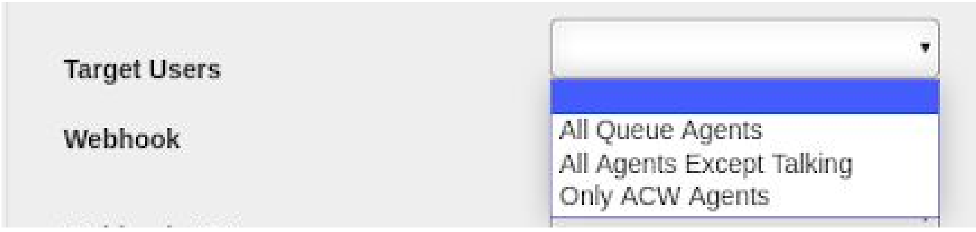
Agent Ready Notification

1. Click the chevron, , located to the left of "Agent Ready," the selection will expand as shown below:

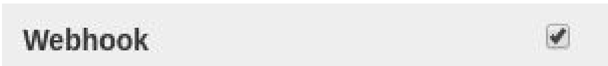


2. Click the "Notification Threshold" type the desired number of waiting calls until the notification will occur.
3. If desired, click the "Send Message to Users" checkbox. (If checked, the agents will receive a notification regarding the waiting call threshold.

4. If the "Send Message to Users" checkbox is checked, the Target Users dropdown box can be clicked to choose which users to send the notification to. The following image shows the dropdown box options:



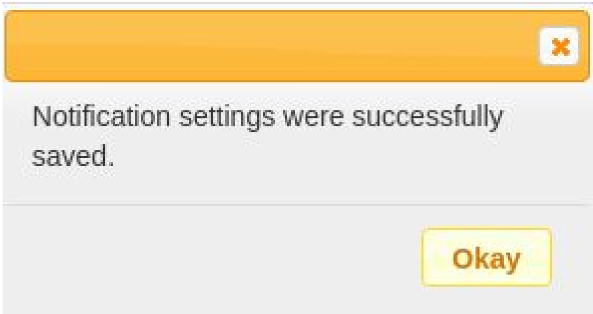
5. Select the desired option.
6. A webhook can be added to the waiting call notification. Check the "Webhook" checkbox, as shown below:



7. After the "Webhook" checkbox is checked, click the "Webhook URL" dropdown box, a list of available Webhook URL options is available (For creating additional options see Web URL section).
8. In the "Resend Notification Cooldown Period" input box, type the desired time for the cooldown period (minutes).

9. After Desired changes have been made, click the save button, 

, the following pop-up window will appear:



10. Click the Ok button, 

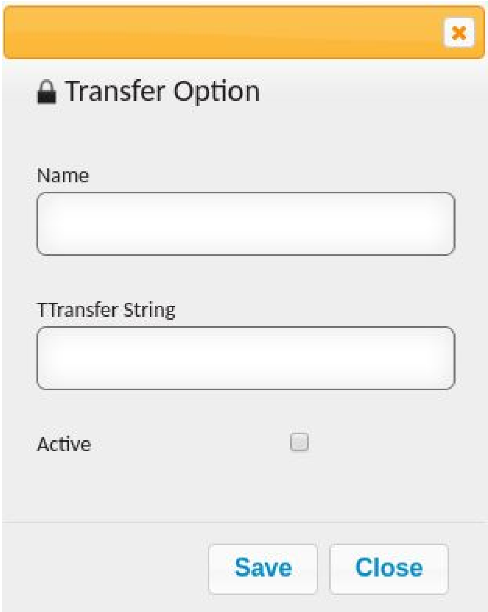
.

Transfer Tab

The transfer tab is used to add direct user's lines using a transfer string to the queue (If the overflow strategy is set for transfer).

Adding a Transfer

1. Click the Add button located in the top right-hand corner of the transfer tab.  . The following pop-up will appear:



2. Click the "Name" input box, type the name of the person that the call will be transferred to.
3. Click the "Transfer String," type a transfer strıng usıng the followıng format:

SIP/Gateway Name/transfer phone number

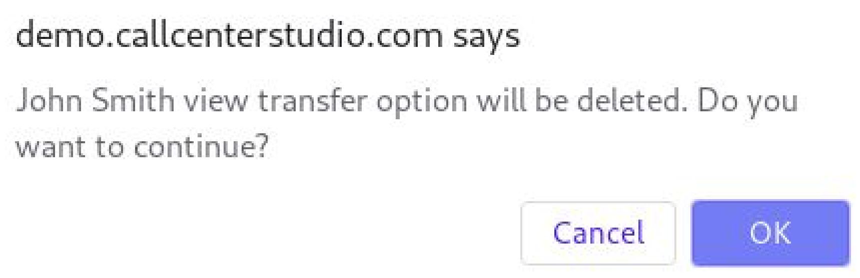
4. Select "Active."
5. Click the save button,  .

Editing a Transfer

1. Click the edit button, , located to the far right of the transfer name.
2. Make the necessary changes.
3. Click the save button, Save .

Deleting a Transfer

1. From the Transfer name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- *Select the cancel button,* Cancel *, to cancel the deletion.*
- *Select the OK button,* OK *, to confirm the deletion.*

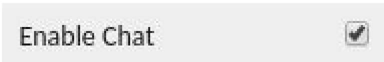
2. Confirm the deletion by clicking the OK button, OK .

The screen will reload, and the deleted transfer will not be shown.

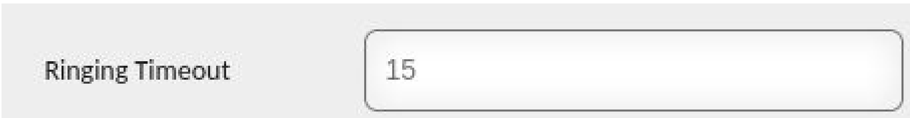
Chat Tab

The chat tab is used to enable the chat feature for the queue, and to manage the ringing timeout setting.

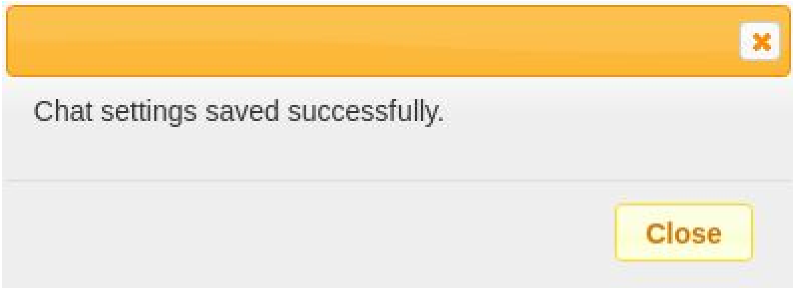
1. To enable chat, check the “Enable Chat” checkbox, as shown below:



2. Click the “Ringing Timeout” input box, type the desired ringing timeout (seconds). The default is shown below:



3. Click the save button, located under the “Ringing Timeout” input box. The following pop-up window will appear:



4. Click the close button, 

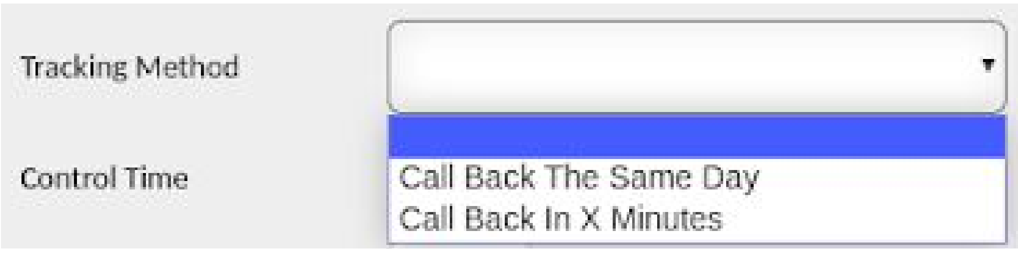
.

Abandon Call Trafficking Tab

The abandoned call trafficking tab is used to enable tracking of abandoned calls and to manage the tracking method.

1. To enable abandon call trafficking, check the “Enable Abandon Call Tracking” input box, as shown below:

2. Click the “Tracking Method” dropdown box. The following selections can be made:



Note: If “Call Back The Same Day” was selected. No further settings need to be adjusted.

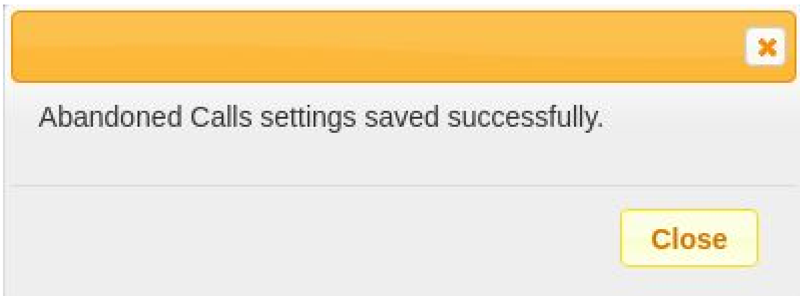
Simply click the save button, 

, located under the “Control Time” input box.

3. If “Call Back In X Minutes” was selected, click the “Control Time” and input the “X” value (minutes). An example is shown below:

4. Click the save button, 

, located under the “Control Time” input box. The following pop-up window will appear:

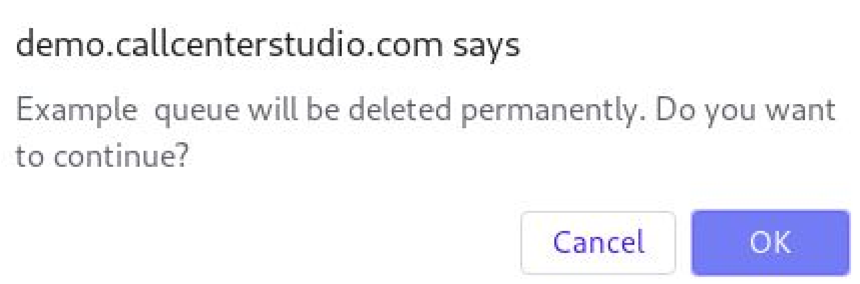


5. Click the close button, 

.

Deleting a Queue

1. From the Queue Name list, click the delete button, , to the right of the edit button, . When the delete button is clicked, the following pop-up will appear:



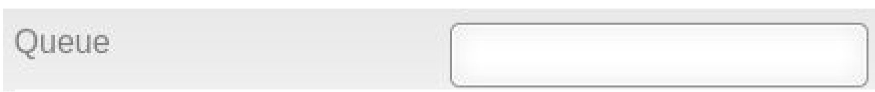
- *Select the cancel button, Cancel, will cancel the deletion.*
- *Select the OK button, OK, will confirm the deletion.*

2. Confirm the deletion by clicking the OK button, OK.

The screen will reload, and the deleted queue will not be shown.

Searching for a Queue

1. Click the "Queue" input box, type the queue's name. The input box is shown below:

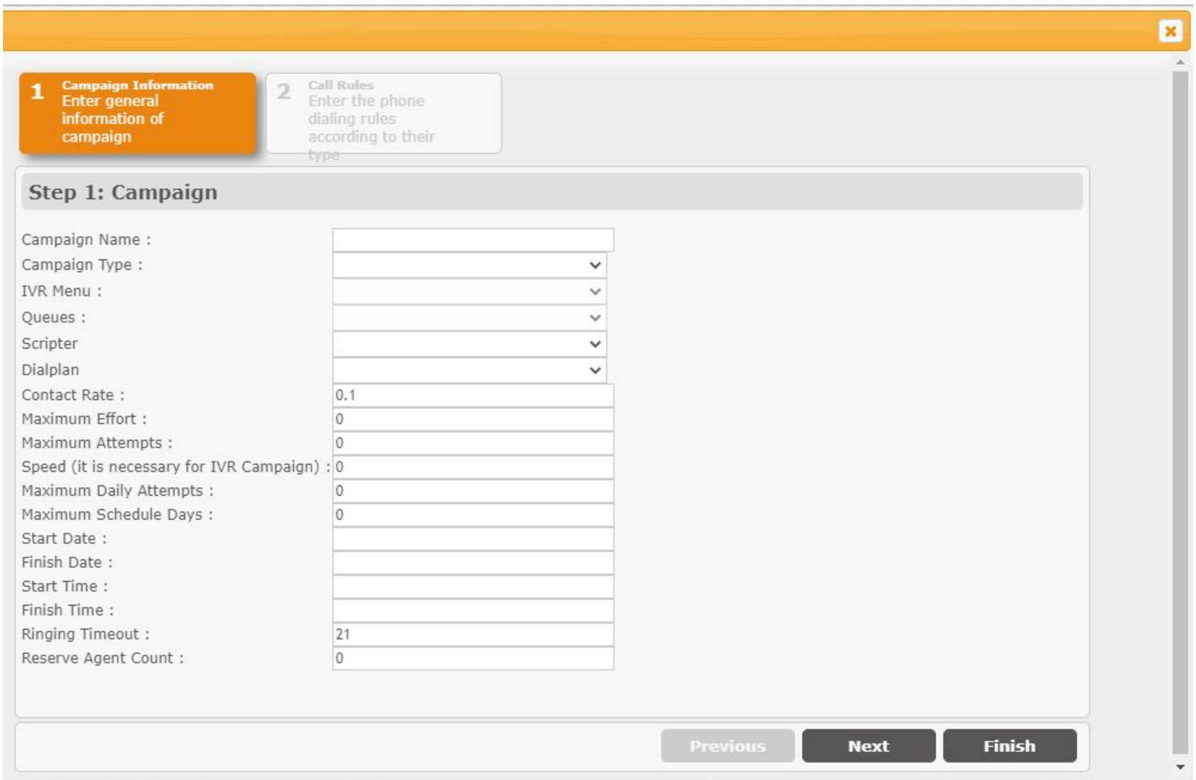


Note: Partial names can be used when spelled correctly.

Campaigns

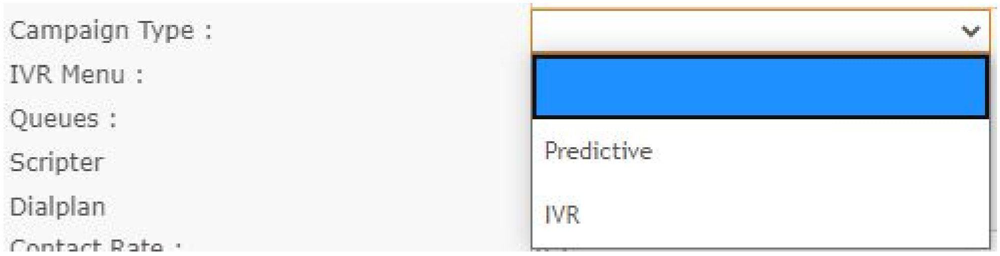
Adding a Campaign

1. Click the add button, , located on the top right corner of the screen. The following pop-up will appear:



1. Click the “Campaign Name” input box, type the desired campaign name. An example is shown below:

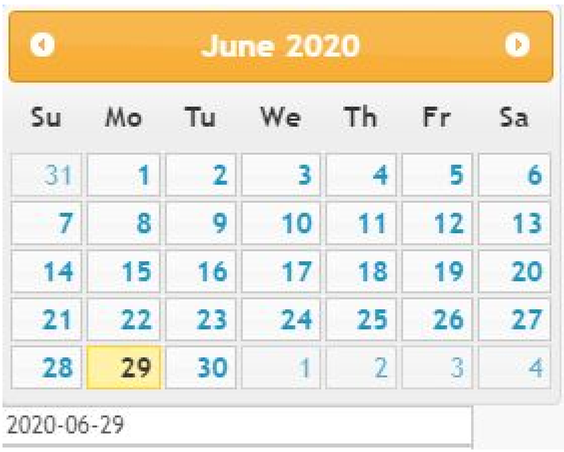
2. Click the "Campaign Type" dropdown box the following selections will appear:



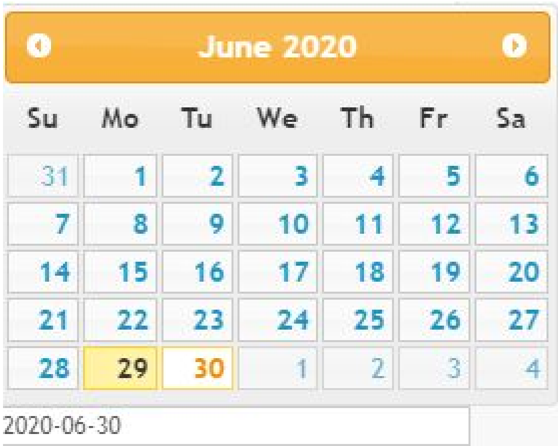
Predictive	A campaign that uses the scripter and agents answer outbound calls performed by the campaign's assigned dialer. For progressive dialers, predictive should be selected, and the default speed should be 1.
IVR	A campaign that makes calls answered by the IVR.

3. Select "Predictive" or "IVR" whichever is desired
4. Click the "Queues" dropdown menu, select the desired queue (Note: only used for a predictive campaign).
5. Click the "Scripter" dropdown menu, select the desired scripter. (Used as agent's script when performing the campaign).
6. Click the "Dialplan" dropdown box, select the desired dialplan.
7. Click the "Contact Rate" input box. The contact rate is set up by default for a 1 to 1 delivery ratio. However, it can be customized if desired.

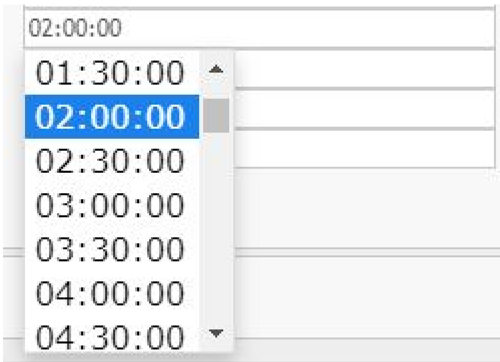
8. Click the “Maximum Effort” input box type the desired amount of redials for reached contacts.
9. Click the “Maximum Attempts” input box, type the desired amount of redials for the campaign contacts.
10. Click the “Speed (it is necessary for IVR Campaign)” input box. This value is multiplied by available agent count in the campaign queue. Max value is 5 for Predictive, and 10 for IVR. For small scale operations, the default value is recommended. Type the desired value.
11. Click the “Maximum Daily Attempts” input box, type the daily redial limit.
12. Click the “Maximum Schedule Days” input box, type the maximum schedule days.
13. Click the “Start Date” input box, which indicates the start date of the campaign. Click on the rectangular bar beside the start date column, and a calendar will popup. Choose the preferred dates on the calendar, as shown below:



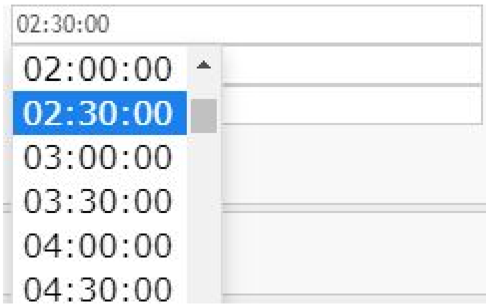
14. Click the “Finish Date” input box, which indicates the end date of the campaign. Click on the rectangular bar beside the finish date column, and a calendar will popup. Choose the preferred dates on the calendar, as shown below:



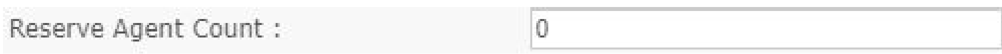
15. Click the “Start Time” input box, which signifies the predetermined time for the campaign to start. The time is set, as shown below:



16. Click the “Finish Time” input box, which indicates the predetermined time to end a campaign. The time is set, as shown below:

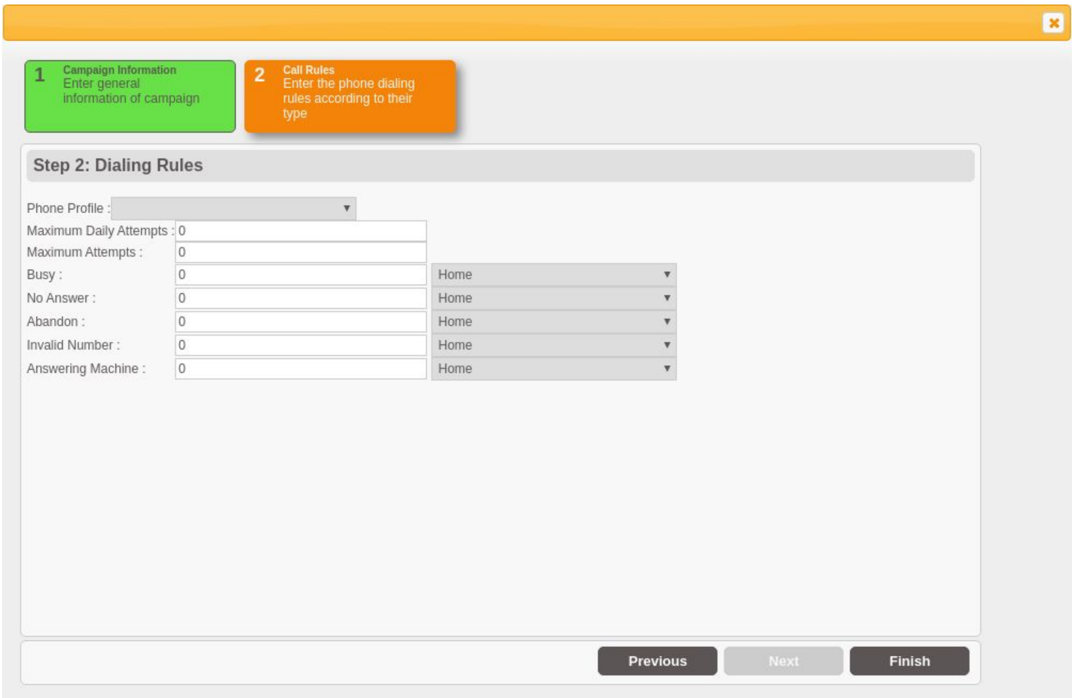


17. Click the “Ringing Timeout” input box, type the desired timeout (ringing timeout is in seconds and can be adjusted).
18. Click the “Reserve Agent Count” input box, which is set as shown below (The number of reserve agents on the campaign, for example, there are 20 available agents, if the reserve agent count is 5, 15 agents will receive dialer calls based on the campaign.

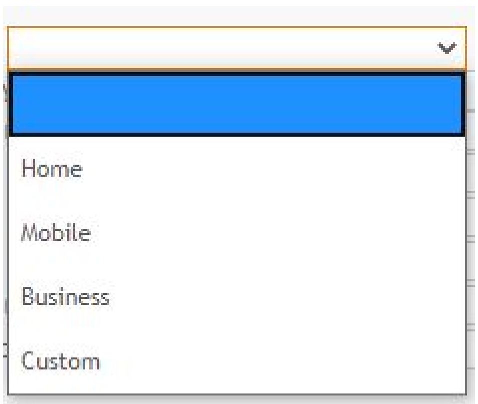


19. Click the Next button, 

. The following screen will be displayed:



20. Click the "Profile Name" input box, which indicates the profile name of the campaign. It is selected by clicking on the blank space beside the profile name bar shown below (Note: At least one profile type needs to be filled out completely to finish creating the campaign):



21. Click the “Maximum Daily Attempts” input box, representing the number of redial attempts in a day.
22. Click the “Maximum Attempts” input box, representing the overall number of redial attempts of the campaign.

The following delays are based in seconds (steps 4-8). For example, if a busy tone is reached, and if “4” was inputted in the busy tone input box. Then, there will be a 4-second delay before the next call is made.

Click the “Busy” input box, which is set, as shown below:

Click the “No Answer” input box which is set as shown below:

Click the “Abandon” input box, which is set, as shown below:

Click the “Invalid Number” input box which **is** set as shown below:

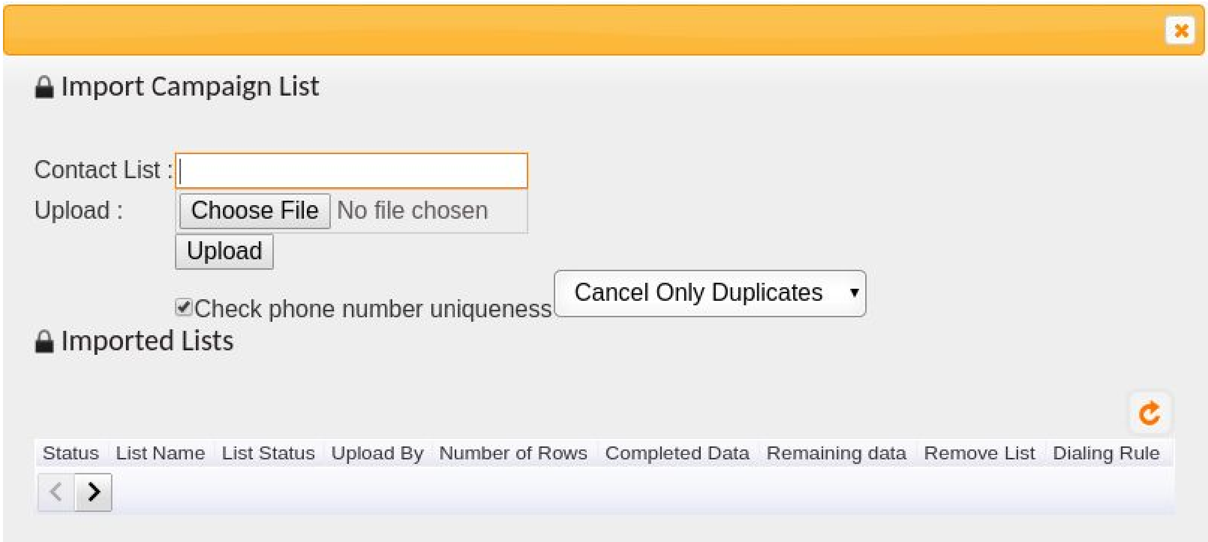
Click the “Answering Machine” input box, which is set, as shown below:

23. To finish setting up the campaign, click on the finish button, 

. The following pop-up will appear:

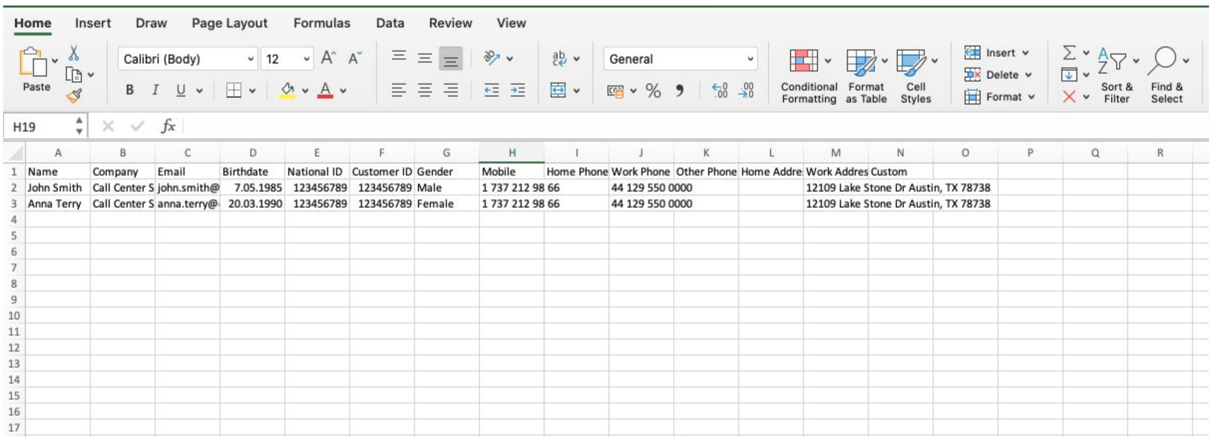
Uploading Campaign Contact List

1. Click on the upload button, located to the right of the desired campaign name. The following pop-up window will appear:

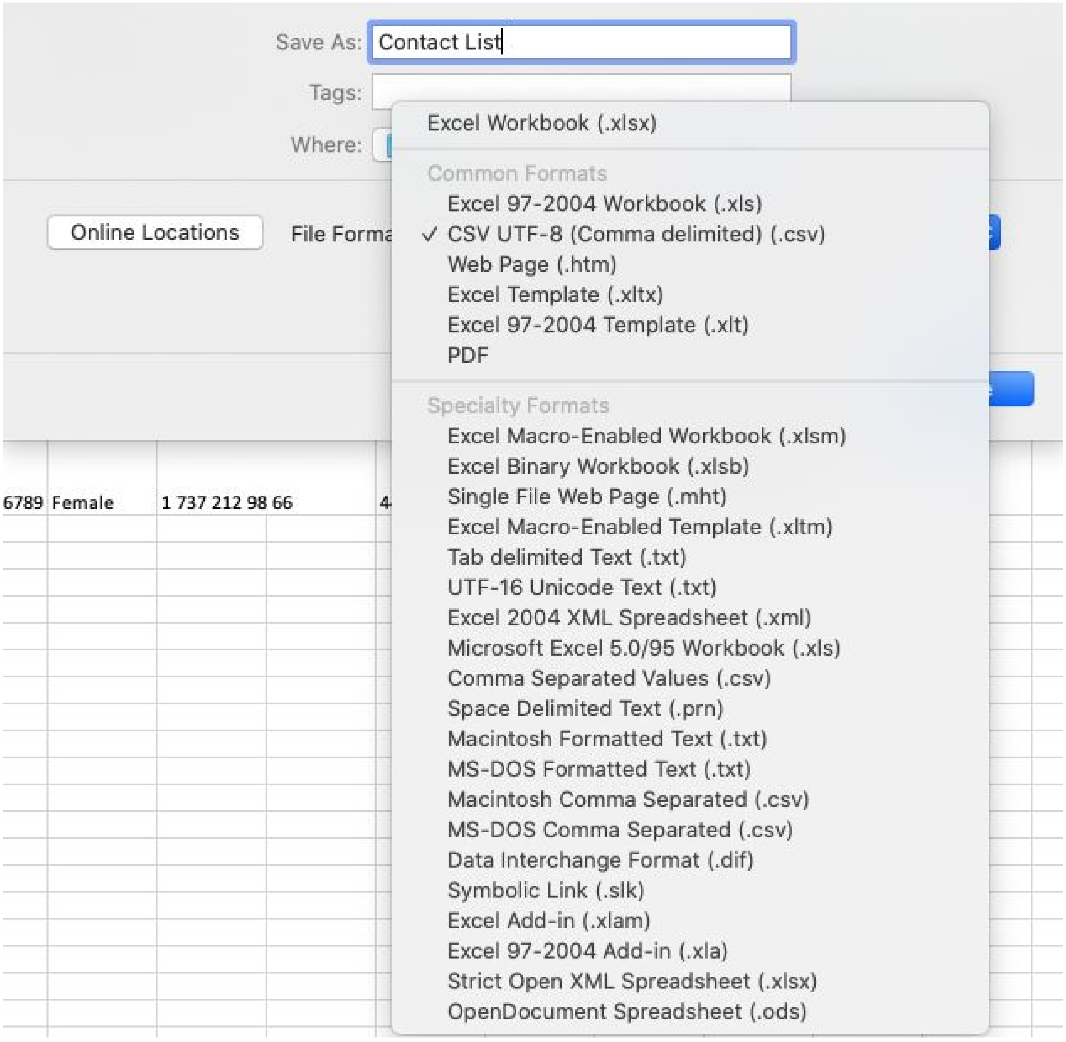


2. Click the "Contact List" input box, type the desired contact list name.
3. Data to be uploaded should be in .CSV format. Create a file using the instructions below:

   A. Write your contact list in an excel sheet, as shown below.



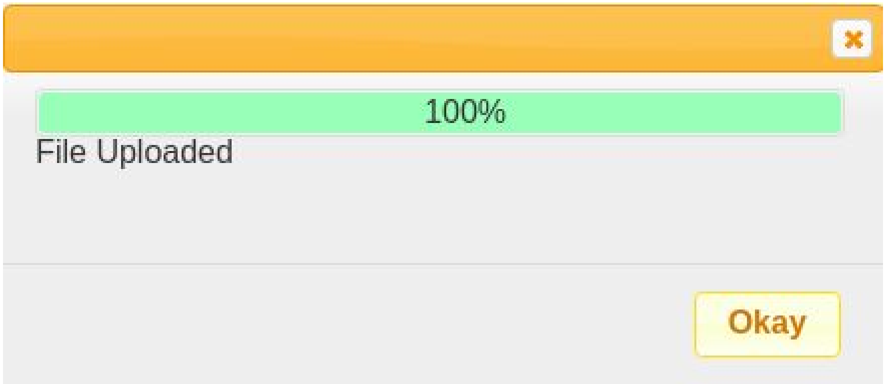
B. Go to "File> Save as" and save it in a .CSV UTF-8 Format, as shown below.



4. Click the "Choose file" button, Choose File , and select the saved file as described above in a .CSV UTF-8 format.

Note: It is possible to track the data and observe whether it has been completed or not. Furthermore, another list can be loaded to the same campaign. It must be kept in mind that there should not be duplicate telephone numbers in the second list. If so, this case will come back as overlapping. To avoid this, check the "Check phone number uniqueness" and select "Cancel Only Duplicates."

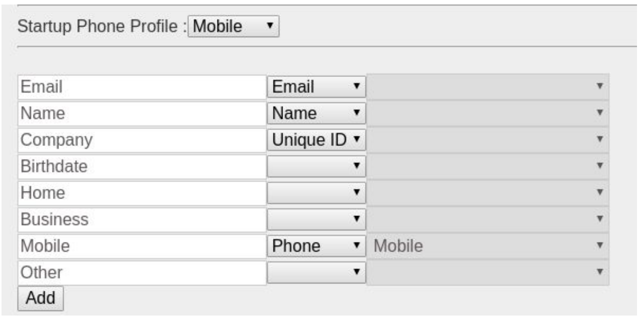
5. Click the upload button. The following pop-up window will appear:



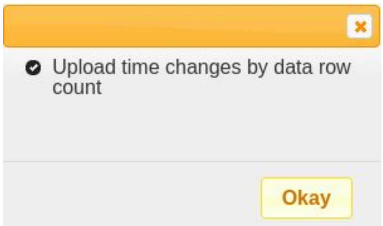
6. Click the Okay button. The following selection will appear in the pop-up window:

7. Click the "Startup Phone Profile," select the desired start-up phone profile for the campaign (Which phone profile will be called first).

8. Match the uploaded date on the left side of the screen with the dropdown list selections (Note: See the “Adding Custom Field Name” section for creating more dropdown selections):



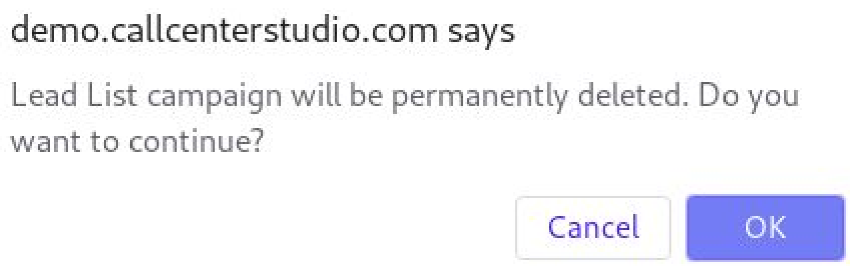
9. Click the Add button, Add, the following pop-up window will appear:



10. Click the Okay button, Okay, the newly uploaded list will be displayed as shown below:

Note: To delete a list, click the delete button, , to the right of the desired lead list located in the Remove List column.

1. When the delete button is clicked the following pop-up will appear:



- *Select the cancel button, , to cancel the deletion.*
- *Select the OK button, , to confirm the deletion.*

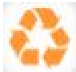
2. Confirm the deletion by clicking the OK button, .

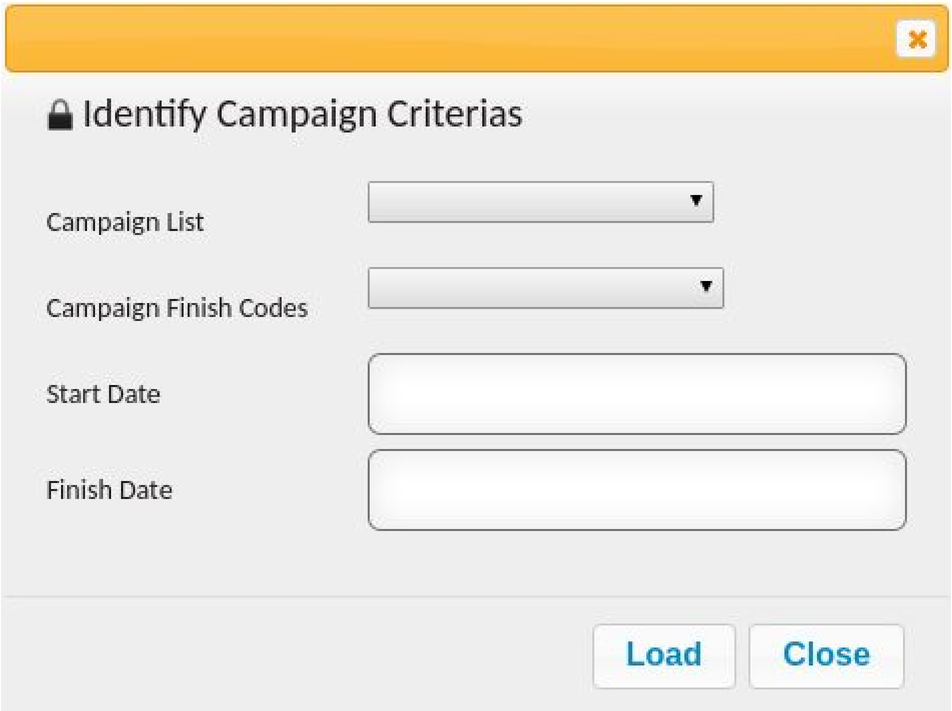
The screen will reload, and the deleted list will not be shown.

Additional Note: Each lead list within a campaign can have separate dialing rules. If desired, click the Plus button, , located to the right of the desired lead list in the Dialing Rule column. (See the Dialing Rules Tab section, to set dialing rules).

Recycling a Campaign Contact List

After a campaign is finished, the campaign list can be reused according to the finish code assigned to each contact. This feature is used to avoid re-adding lists into the campaign.

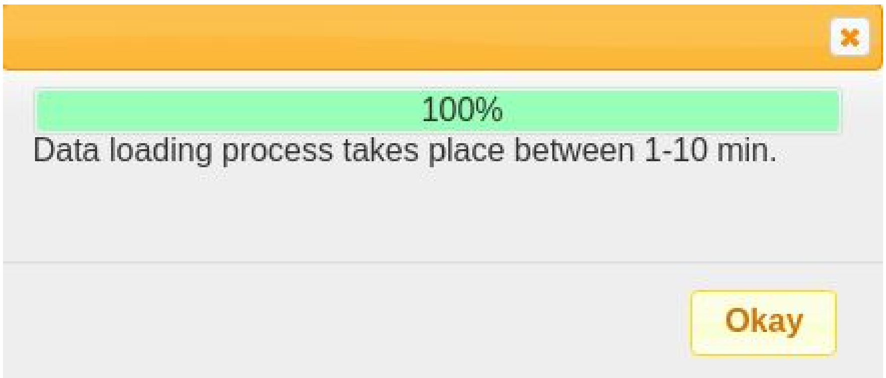
1. Click on the recycle button,  located to the right of the desired campaign name. The following pop-up window will appear:



2. Click the "Campaign List" dropdown menu, choose the desired contact list in the campaign.
3. Click the "Campaign Finish Codes" dropdown menu, choose the desired finish code to reuse.
4. Click the "Start Date" input box, choose the desired start date to filter the finish code.
5. Click the "Finish Date" input box, choose the desired finish date to filter the finish code.

6. Click the Load button, 

. The following pop-up window will appear:



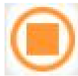
7. Click the Okay button, 

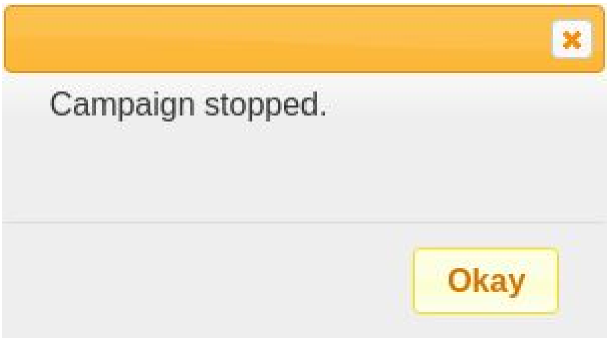
. The new list will appear under the campaign uploaded lists section.

Starting a Campaign

1. Click the start button,  located to the right of the desired campaign name (Start / Stop Campaign Column).

Stopping a Campaign

1. When the campaign is running, click the stop button, . The following pop-up window will appear:

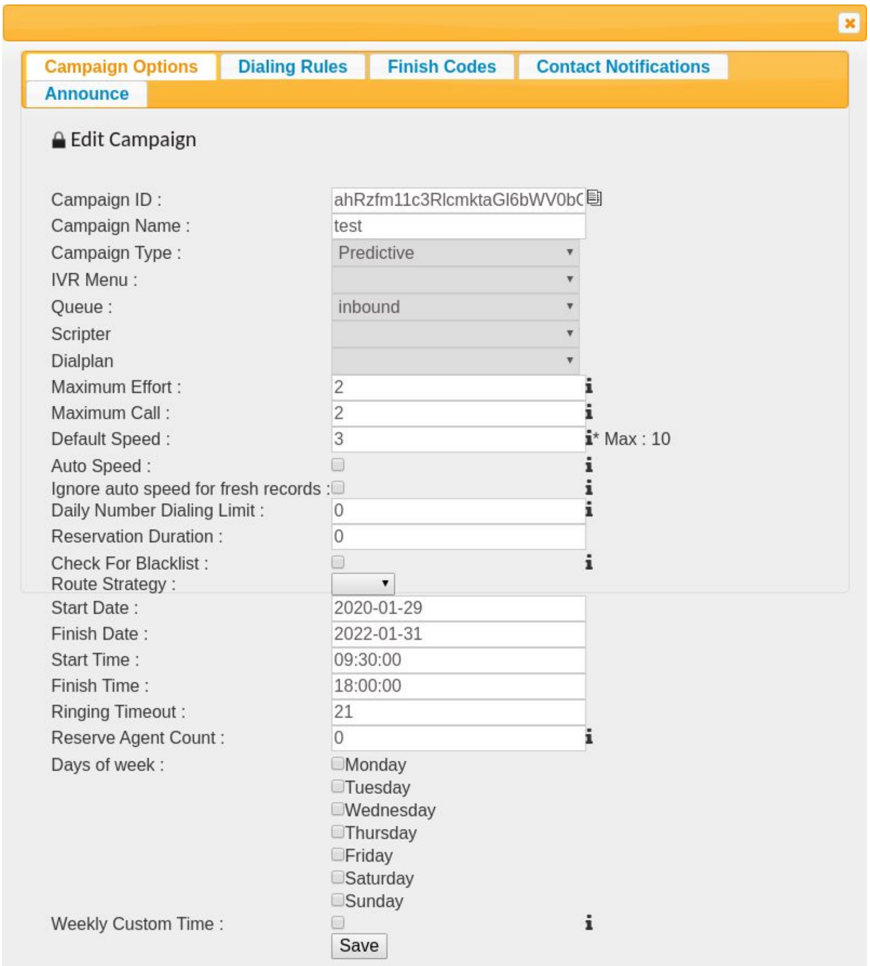


2. Click the Okay button, 

.

Editing a Campaign

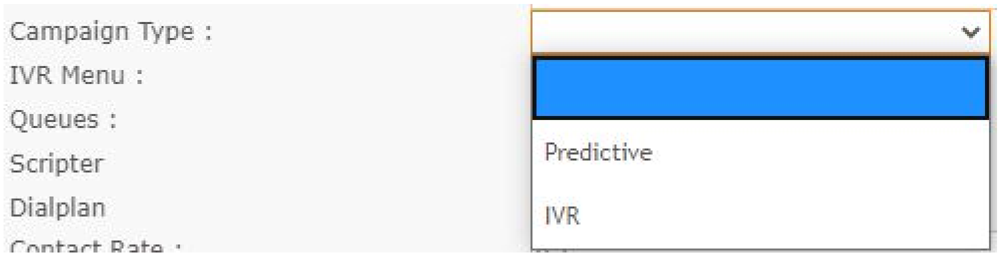
Click the edit button, , located to the far right of the campaign name the following screen will appear:



Campaign Options Tab

1. Click the “Campaign Name” input box, type the desired campaign name. An example is shown below:

2. Click the “Campaign Type” dropdown box the following selections will appear:



Predictive	A campaign that uses the scripter and agents answer outbound calls performed dialer assigned to the campaign. For progressive dialers, predictive should be selected, and the default speed should be 1.
IVR	A campaign that makes calls answered by the IVR.

3. Select “Predictive” or “IVR” whichever is desired.
4. Click the “Queues” dropdown menu, select the desired queue (Note: only used for the predictive campaign).

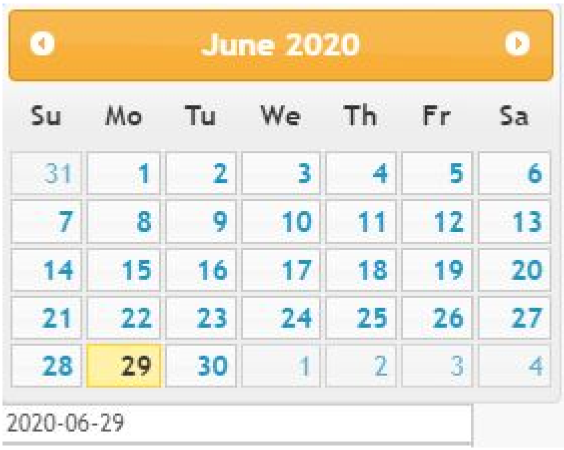
5. Click the “Scripter” dropdown menu, select the desired scripter. (Used as agent’s script when performing the campaign).
6. Click the “Dialplan” dropdown box, select the desired dialplan.
7. Click the “Contact Rate” input box. The contact rate is set up by default for a 1 to 1 delivery ratio. However, it can be customized if desired.
8. Click the “Maximum Effort” input box type the desired amount of redials for reached contacts.
9. Click the “Maximum Attempts” input box, type the desired amount of redials for the campaign contacts.
10. Click the “Speed (it is necessary for IVR Campaign)” input box. This value is multiplied by available agent count in the campaign queue. Max value is 5 for Predictive, and 10 for IVR. For small scale operations, the default value is recommended. Type the desired value.

    Or

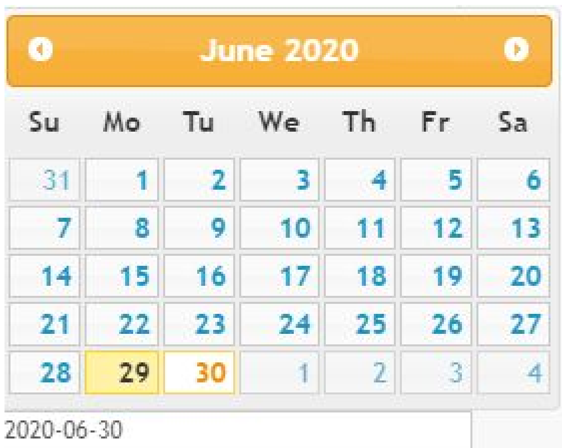
    The “auto speed” checkbox can be selected, which is based on the amount of previously available agents.

    The "Ignore auto speed for fresh records” checkbox can be selected, which ignores the auto speed for newly added contacts.
11. Click the “Daily Number Dialing Limit” input box, type the daily number dialing limit.
12. Click the “Reservation Duration” input box, type the reservation duration (seconds).
13. Check the “Check for Blacklist” checkbox if desired (checks the numbers to see if it is blacklisted before making the call).

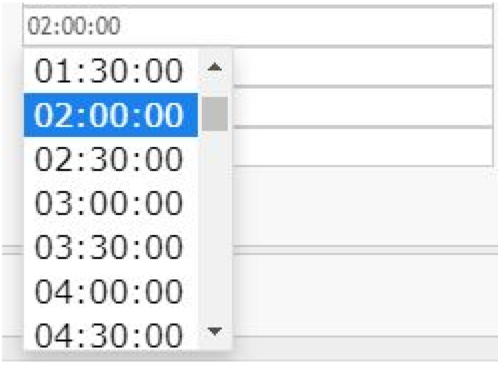
14. Click the "Maximum schedule days" input box, which signifies the campaign's intended number of days. Type the desired number of days.
15. Click the "Start Date" input box, which indicates the start date of the campaign. Click on the rectangular bar beside the start date column, and a calendar will popup. Choose the preferred dates on the calendar, as shown below:



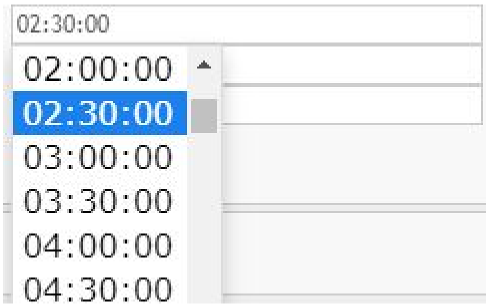
16. Click the "Finish Date" input box, which indicates the end date of the campaign. Click on the rectangular bar beside the finish date column, and a calendar will popup. Choose the preferred dates on the calendar, as shown below:



17. Click the "Start Time" input box, which signifies the campaign's preferred time to start. The time is set, as shown below:

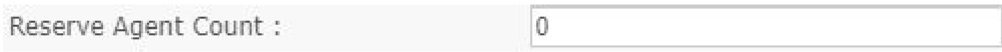


18. Click the "Finish Time" input box, which indicates the predetermined time to end a campaign. The time is set, as shown below:



19. Click the "Ringing Timeout" input box which is set as shown below (ringing timeout is in seconds and can be adjusted):

20. Click the “Reserve Agent Count” input box, which is set as shown below (The number of reserve agents on the campaign, for example, there are 20 available agents, if the reserve agent count is 5, 15 agents will receive dialer calls based on the campaign.



21. Under agent count the days of the week are shown, check the desired days for the campaign to run, or check “Custom Time” and the following selections will appear:

22. Complete the custom time chart if desired. (Note: the custom time plan is not affected by previous dates and times inputted above).

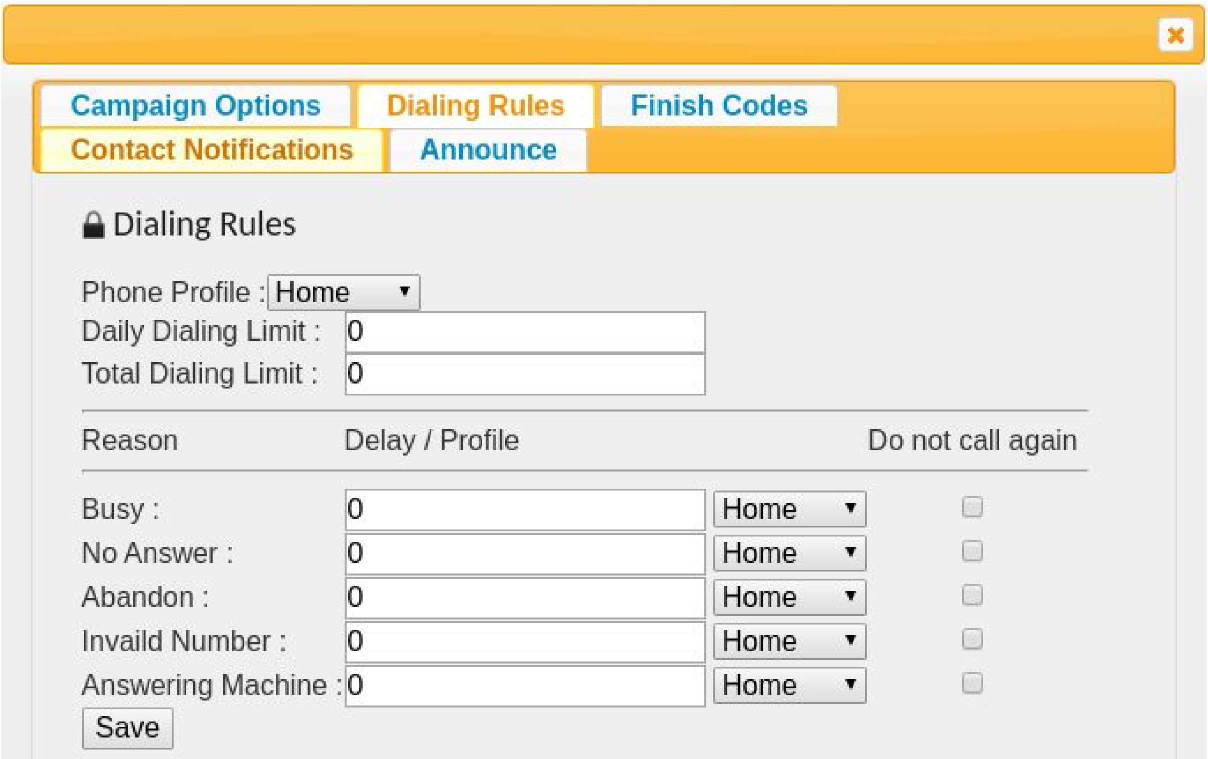
23. Click the save button, 

.

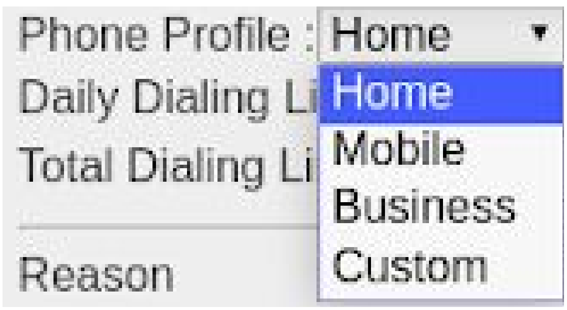
Dialing Rules Tab

Dialing rules are created to set specific dialing rules based on the number profile.

Click the Dialing Rules tab, Dialing Rules . The following screen will appear:



1. Select the desired Phone Profile as shown below (Note: this can be done for each phone profile):



2. In the “Daily Dialing limit,” input box type the desired daily redialing limit for each contact.

3. Click the "Total Dialing limit" input box. Type the desired campaign total redialing limit for each contact.

The following delays are based in seconds (steps 4-8). For example, if a busy tone is reached, and if "4" is inputted in the busy tone input box. Then, there will be a 4-second delay before the next call is made. (Note: the "Do not call again" checkbox can be selected based on what occurred during the call).

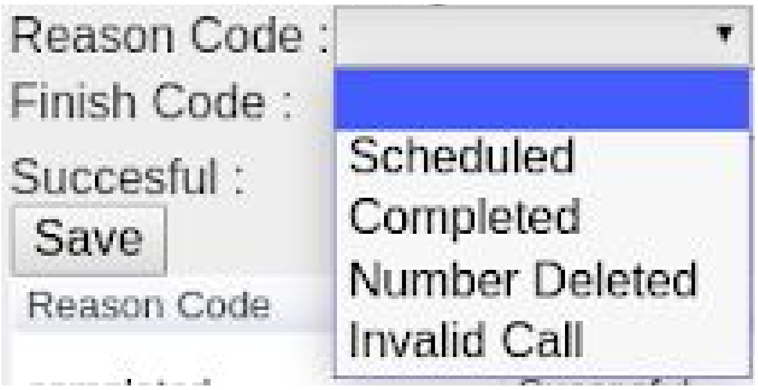
4. Click the "Busy" input box, type the delay time in seconds until the next call will be dialed.
5. Click the "No Answer" input box, type the delay time in seconds until the next call will be dialed.
6. Click the "Abandon" input box, type the delay time in seconds until the next call will be dialed.
7. Click the "Invalid Number" input box, type the delay time in seconds until the next call will be dialed.
8. Click the "Answering Machine" input box, type the delay time in seconds until the next call will be dialed.
9. Click the save button, Save .

Finish Codes Tab

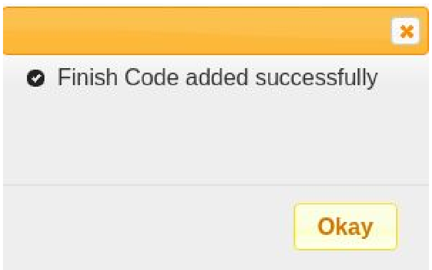
Finish codes can be created to organize the campaign and to organize the contacts based on what occurred during the call.

Click the Finish Codes tab, Finish Codes . The following screen will appear:

1. Click the “Reason Code” dropdown box. The following dropdown menu will appear:



2. Select the desired reason code.
3. Click the “Finish Code” input box, type the desired finish code.
4. If the Finish Code is created for a successful contact, select the “Successful” checkbox.
5. Click the save button, Save , the following screen will appear:



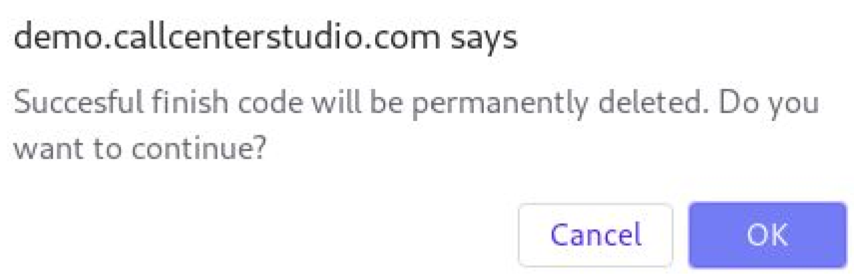
6. Click the okay button, Okay , the newly created Finish Code will be added to the Finish Code list.

Editing a Finish Code

1. Click the edit button, , located to the far right of the finish code name.
2. Make the necessary changes.
3. Click the save button, Save .

Deleting a Finish Code

1. From the Finish Code name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- *Select the cancel button,* Cancel *, to cancel the deletion.*
- *Select the OK button,* OK*, to confirm the deletion.*

2. Confirm the deletion by clicking the OK button, OK .

The screen will reload, and the deleted finish code will not be shown.

Contact Notifications Tab

Contacts notifications can be added to a CRM via a webhook using this tab.

1. If desired, check the “Contact Webhook Enabled” checkbox.
2. Click the “Contact Webhook URL” and input the URL.
3. If desired, check the “Call Result Webhook Enabled” checkbox.
4. Click the “Call Result Webhook URL,” and input the URL.
5. After the desired additions have been made, click the save button, Save .

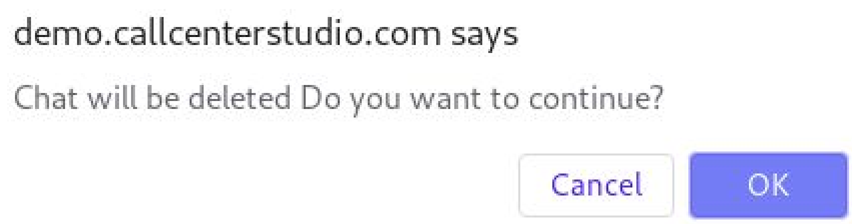
Announce Tab

Announcements used during the campaign can be added here.

1. Click the “Announcement” dropdown box, select the desired announcement (Note: additional announcements can be added in the announcements section).
2. Click the “Announcement Repeat Period (Second)” type the desired time duration in seconds.
3. If desired, the “Instantly Play Once When Call Answered” checkbox can be checked to play the announcement once the call is answered.
4. After the desired additions have been made, click the save button, Save .

Deleting a Campaign

1. From the Campaign list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- *Select the cancel button,* Cancel *, to cancel the deletion.*
- *Select the OK button,* OK*, to confirm the deletion.*

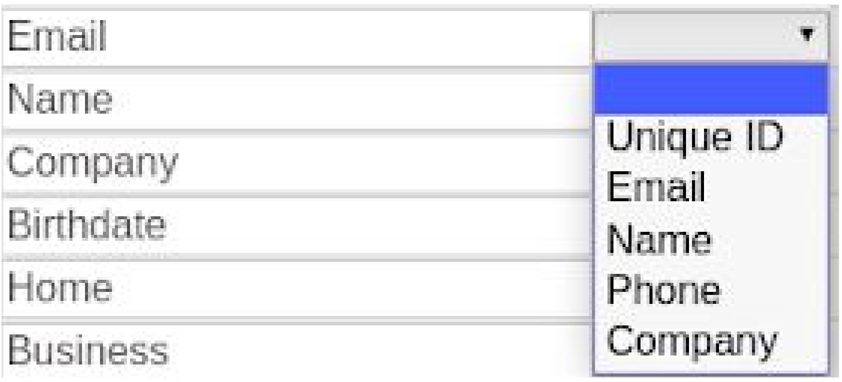
2. Confirm the deletion by clicking the OK button, OK.

The screen will reload, and the deleted campaign will not be shown.

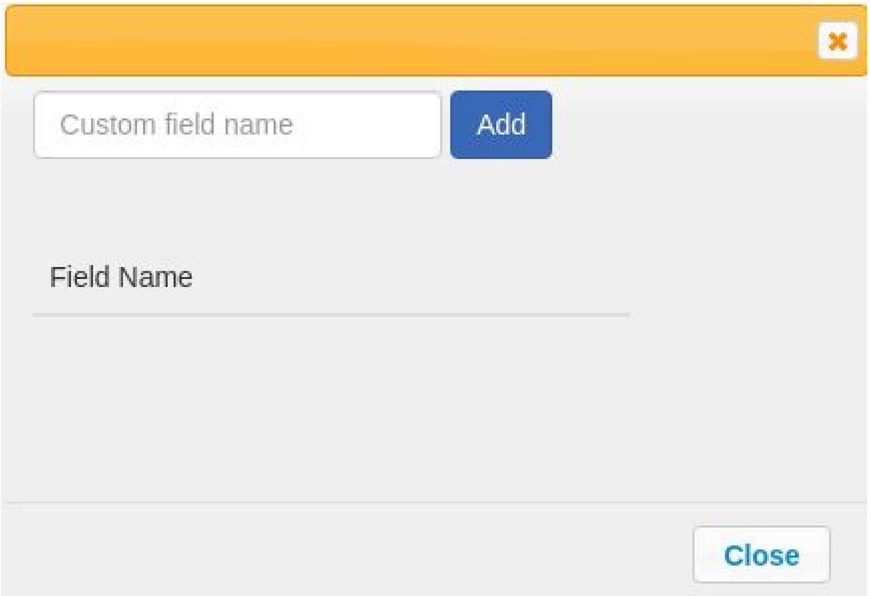
Adding Custom Field Name

When uploading a contact list for a campaign, Unique ID, Email, Name, and Phone are the default input field for the selection as shown below:

If desired, additional fields can be created to match additional information uploaded in the Call Center Studio system. For Example, Company is an uploaded field from the created .CSV file. Once, a custom field is created the dropdown selection will also have Company listed so that they can be matched as shown below:

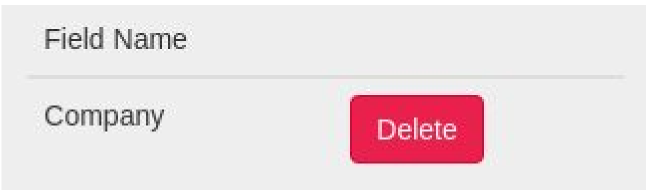


1. From the Campaign list, click the custom field button, , to the right of the delete button, . When the delete button is clicked the following pop-up will appear:



2. Click the “Custom field name” input box, type the desired custom field name.

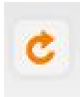
3. Click the Add button, Add. A created example is shown below:



Note: To delete the custom field name, click the “Delete” button, Delete*, located to the right of the desired custom field name.*

4. After adding custom fields, click the Close button, Close, to return to the campaign name list.

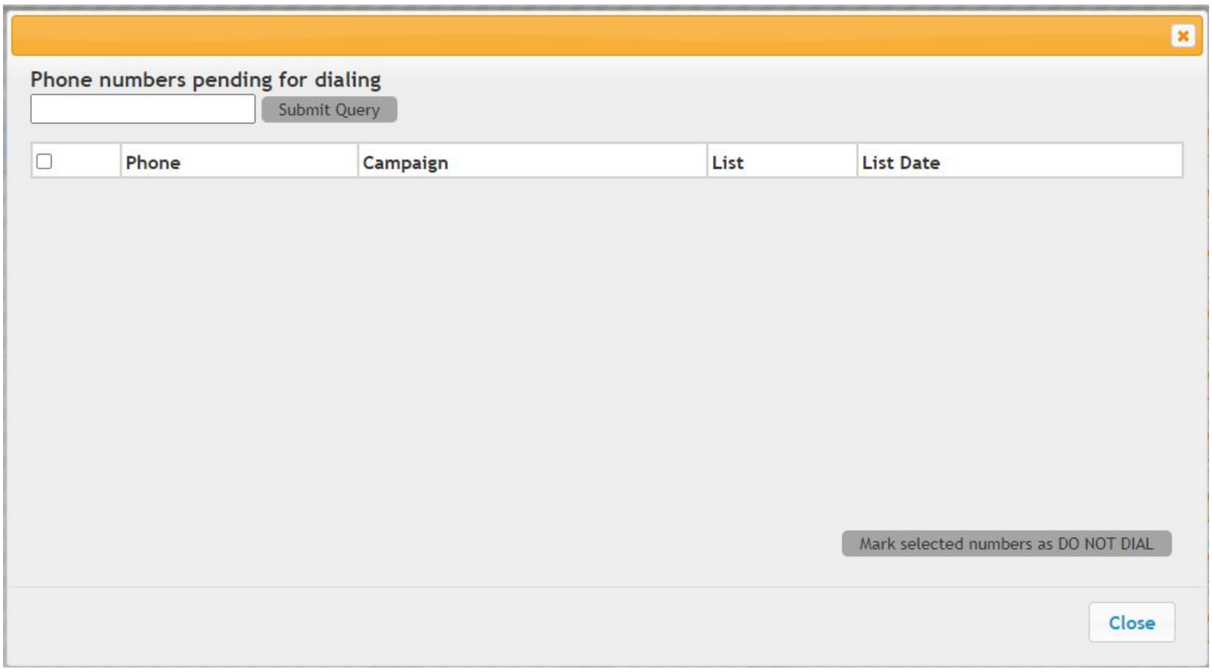
Refreshing Campaign Section

1. To refresh the campaign section, click on the refresh button  located on the top right corner of the screen.

Data Management by Phone Number

Used to determine if numbers are in multiple campaigns, and can also be used to place numbers on the do not call list.

1. Click on the data management icon  located in the top right corner of the screen. The image below will appear:



2. Submit a query by inputting the phone number in the submit query bar.
3. Click on the submit query button.

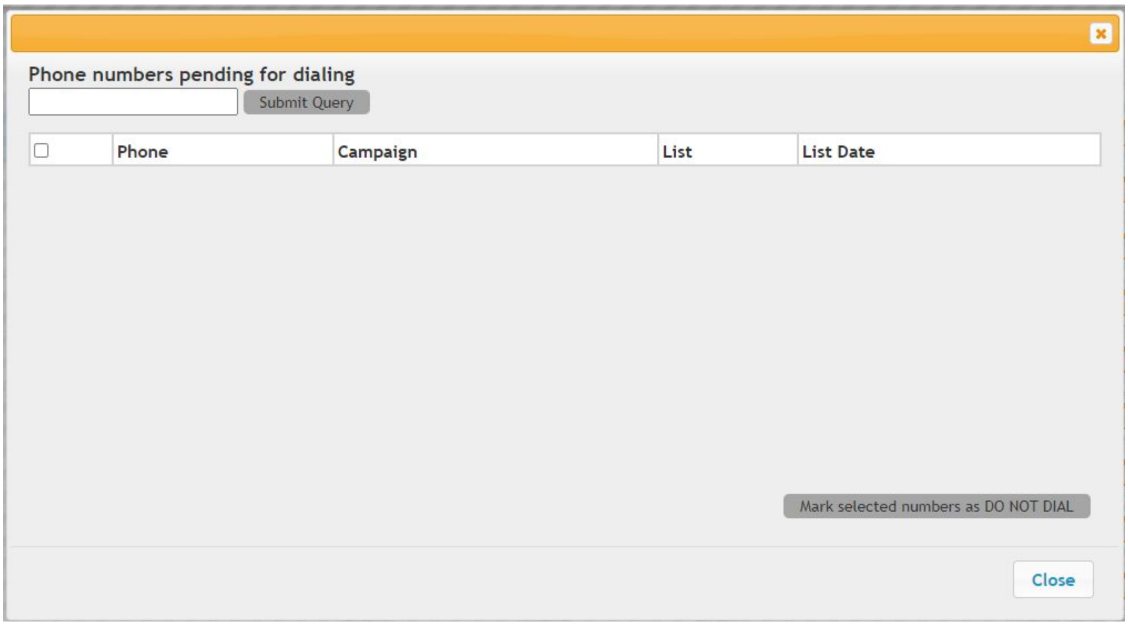
4. Click on the close button, 

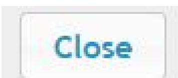
, to finish data management.

Data Management by Unique ID

Used to determine if numbers are in multiple campaigns, and can also be used to place numbers on the do not call list.

1. Click on the data management icon  located on the top right corner of the screen. The image below will appear:

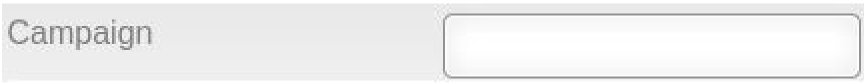


2. Submit a query by inputting the unique ID (can be found in the reporting section after downloading the desired campaign .CSV file, a column will be labeled unique ID, each call is assigned a unique ID) in the submit query bar.
3. Click on the submit query button.
4. Click on the close button 

below to finish data management.

Searching for a Campaign

1. Click the "Campaign" input box, type the campaign's name the input box is shown below:



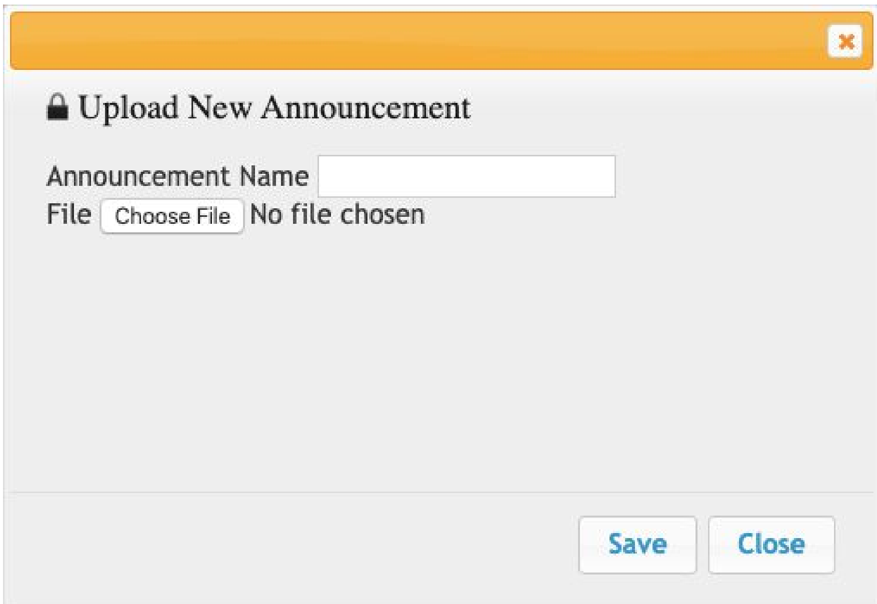
Note: Partial names can be used, when spelled correctly.

Announcements

It is the menu where the announcements used in the IVR are loaded and edited.

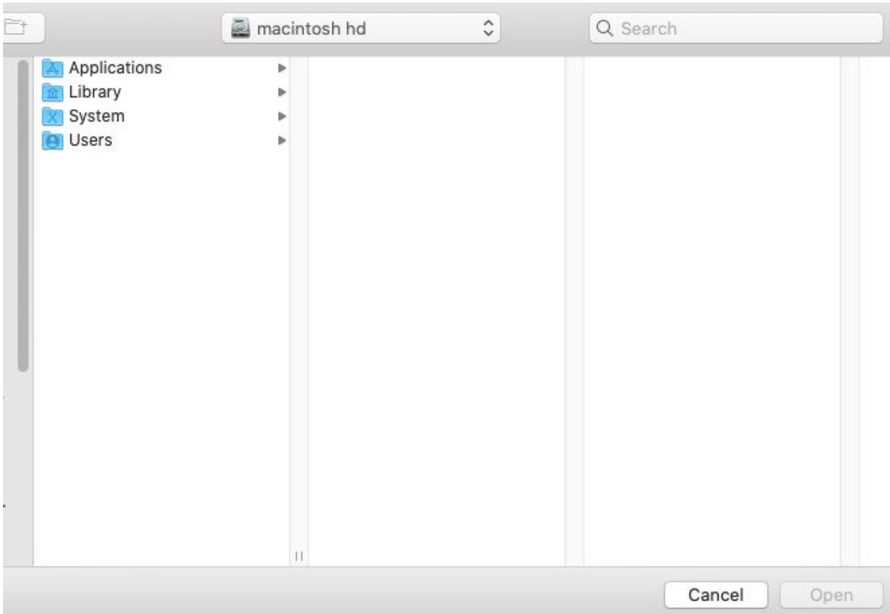
Adding an Announcement

1. To add the announcement, press the add button,  , if done correctly, the following pop-up window will be displayed:



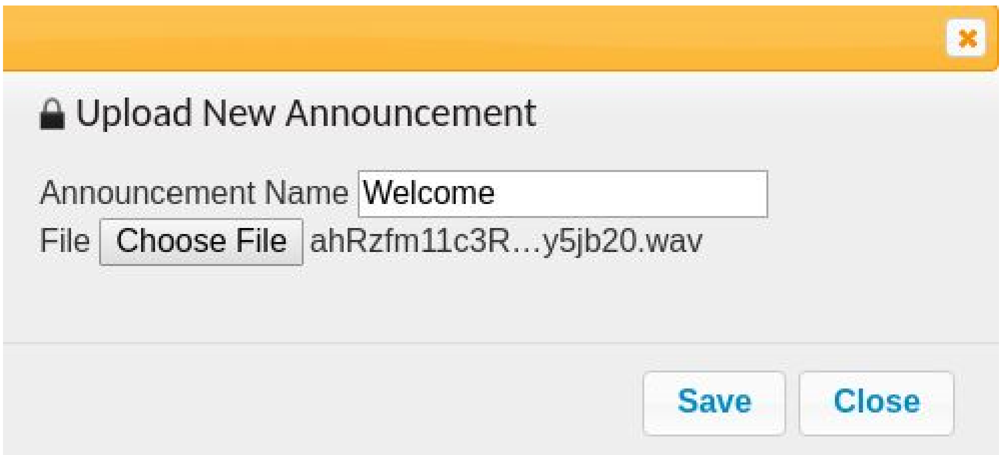
2. Write the preferred announcement name in the input box next to the "Announcement Name" an example is shown below:

3. To choose the sound file, press the "choose file" button, Choose File, then double click the related sound file from the file explorer. As shown below:



Note: Sound files loaded to the system must be in 8000Hz bandwidth, single-channel (mono), 16bit, and in .wav file extension.

After selecting the sound file, the pop-up window will show the uploaded sound file as depicted below:



4. Once the sound file is selected, press the “Save” button. If done correctly, the announcement will be displayed under the “Announcement” list as shown below:

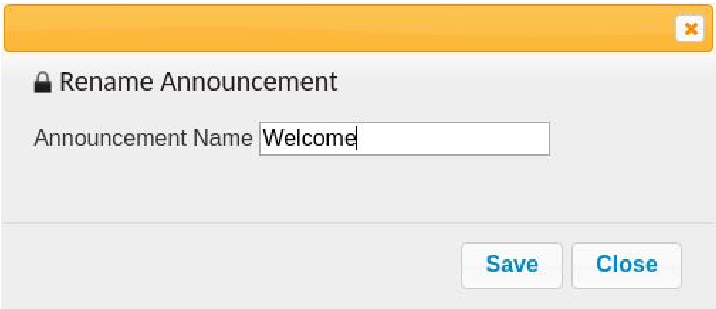
Sound files in the system can be downloaded for listening. They can also be deleted and edited.

Editing an Announcement

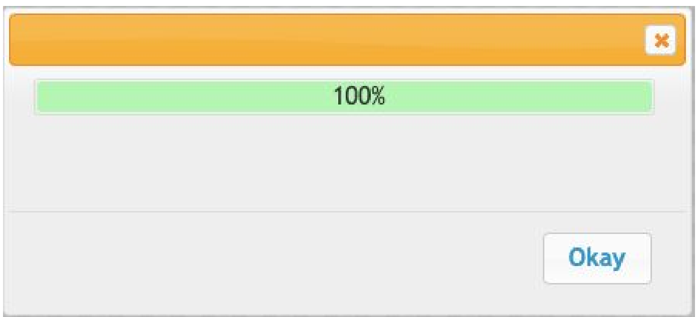
Note: Only the name of the announcement can be edited here.

1. To edit an announcement, click the edit button, , located on the far right of the "Announcement Name" as shown, below:

2. After clicking the edit button, the announcement pop-up window will appear as shown. Changing the Announcement Name can be made using this pop-up window.



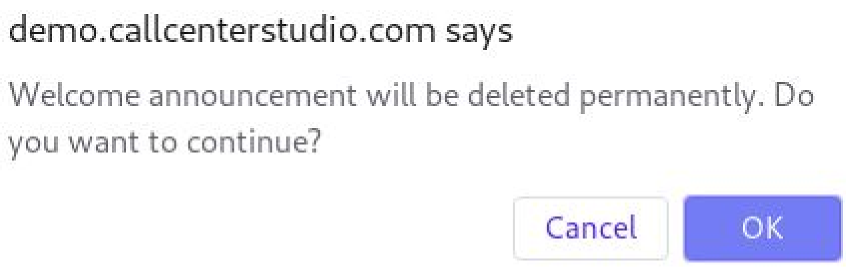
3. Make changes as desired.
4. Once the desired changes have been completed, the information can be saved by clicking the save button, Save, the following pop-up box will appear:



5. Click the Okay button, Okay, to confirm the changes.

Deleting an Announcement

1. From the Announcement list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- *Select the cancel button,* Cancel *, to cancel the deletion.*
- *Select the OK button,* OK *, to confirm the deletion.*

2. Confirm the deletion by clicking the OK button, OK .

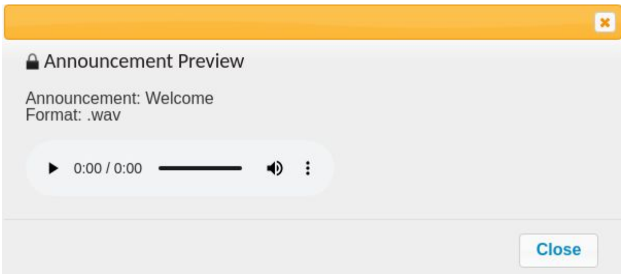
The screen will reload, and the deleted team will not be shown.

Downloading an Announcement

1. To download the announcement, click the download button 

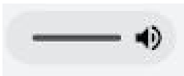
Listening to an Announcement

1. To listen to the announcement, click the "Listen" button  the following pop-up window will be displayed:

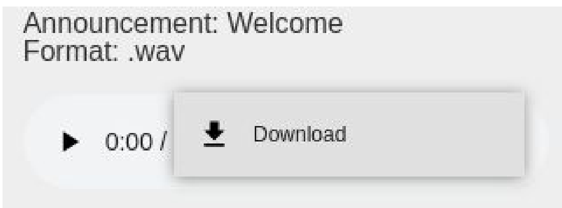


2. To listen to the announcement, click the play button,  .

Note: volume can be adjusted using the bar shown below:

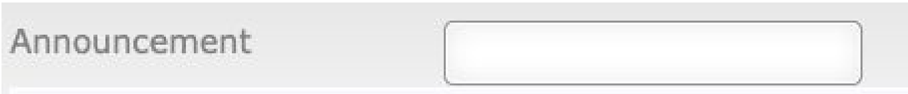


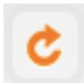
The announcement can be downloaded by clicking the three vertical dots, *, to the right of the volume button,*  *. And then click the "Download" button as shown below:*



Searching for an Announcement

The input box to the right of Announcement can be used to find announcements quickly:



To refresh the page, click the refresh button, 

Statuses

Statuses are defined for users registered in the system having agent roles. Multiple settings for agent statuses can be changed, created, and edited here.

Example:

Suppose break time determined is 20 minutes, and the agent stays in the break time status longer than 20 minutes. In that case, the agent’s row will be highlighted in the supervisor screen, indicating to the supervisor that an agent is past the allotted time. Also, a warning phrase, “you are in the same status for a long time, please change your status” is displayed on the agent’s screen.

Default Statuses:

The following table shows all the Default Statuses:

Default Statuses

Alarm (min) / Pop up (sec) / Limit (ct)

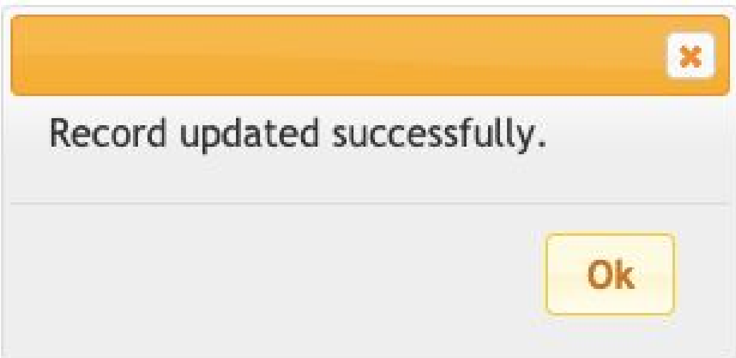
Talking	0	0	-
Dialing	2	0	-
Available	1	0	-
shortbreak	1	2	0
Lunch	1	1	0
Meeting	1	1	0
Training	1	8	0
ACW	1	20	0
Ringing	2	0	-
Wrapup	1	0	-
Chat	1	0	-
Outbound	1	5	-
Back Office	2	0	0
Hold Message	1	0	-
Not Answering	2	0	-

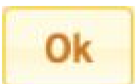
Save

1. The first column shows the **statuses**. For further information about the statuses, check the Agent Section of this Manual.

2. The second column shows the **alarm minutes**. Once the agent waits in the related statuses more than the preferred limit, an alarm pops up on the supervisor's screen.
3. The third column shows the **pop-up seconds.** Once the agent waits in the related statuses more than the preferred limit, an alarm pops up in the agent's screen for the length of time inputted into this column.
4. The fourth column shows **preferred limits** for each Statuses Limits (ct). 0 (zero) will disable a limit check for specified status. Negative values will disable the specified status entirely. If a positive number is inputted, for example, "1", only one agent can be in this status.
5. Write the numbers to the input boxes in the second, third and fourth columns, then click the save button, Once the desired changes have been completed, the information can be saved by clicking the save button, 

, the following pop-up box will appear:



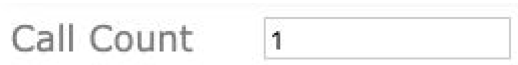
6. Click the Okay button, 

, to confirm the changes.

Pending Call Alarm

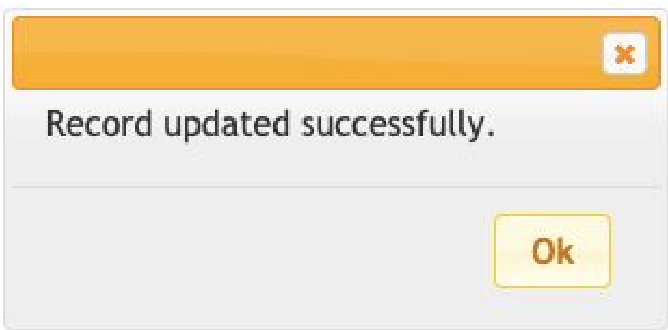
Note: Furthermore, Pending Call definition can be performed to trace calls waiting in the supervisor screen and enable warnings to be taken as well.

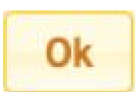
1. Click the "Call Count" input box, type the preferred call count in the layout shown below:



2. Click the "Call Duration" input box, type the preferred Call Duration (in seconds) in the layout shown below:

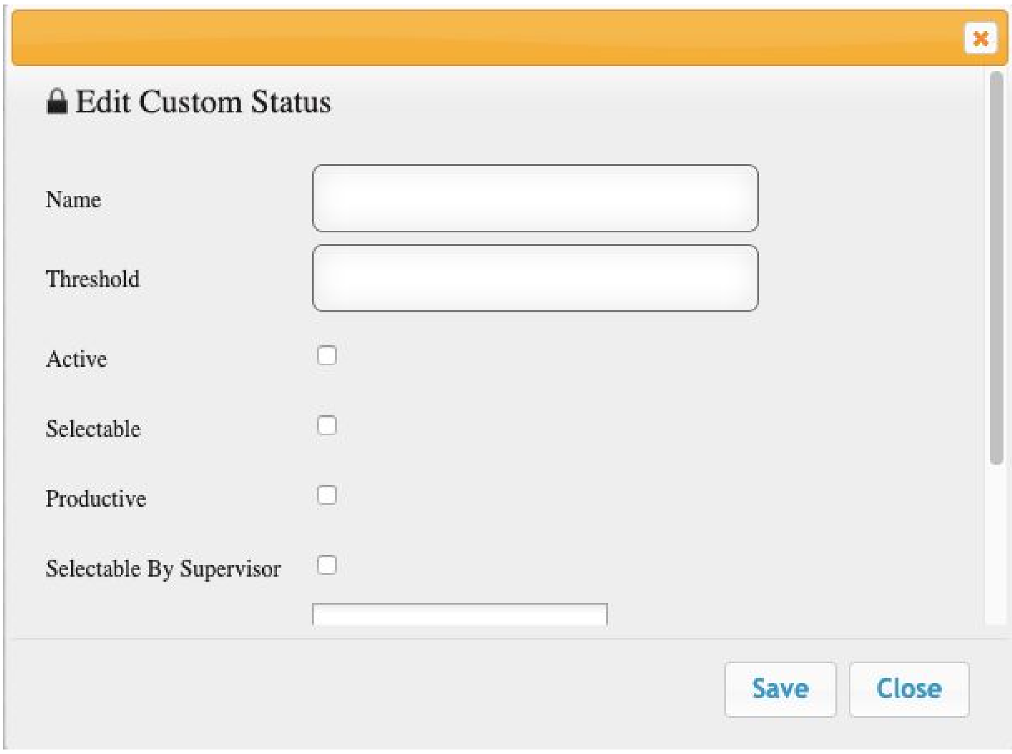
3. Once the desired changes have been completed, the information can be saved by clicking the save button,  , the following pop-up box will appear:



4. Click the Okay button,  , to confirm the changes.

Creating a Custom Status

1. To add the custom announcement, press the add button,  , if done correctly, the following pop-up window will be displayed:



2. Click the “Name” input box. Type the desired name for the status.
3. Click the “Threshold” input box, type the desired threshold value.

4. The following checkboxes are explained below, and can be selected as desired:

Active	Makes the status "Active."
Selectable	Makes the status "Selectable."
Productive	When this checkbox is checked for the status, when the agent selects the status, the status time will be added into the Production calculation in the Reporting section under the Agent Performance Report.
Selectable By Supervisor	Makes the status selectable to the supervisor.

5. In the "Team" input box, a team can be assigned to the custom status for use, if desired.
6. In the "Limit" input box, a status limit can be assigned to the status so that only a limited number of agents can select the status in a given time period.

Note: If "0" is selected, there will be no status limit. If a negative number is selected, the status will be disabled entirely.

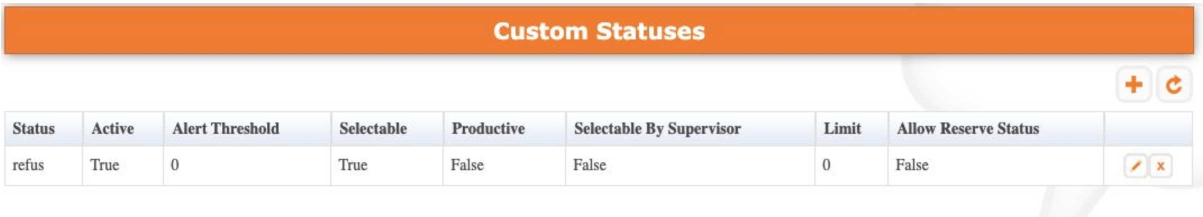
7. If done correctly, the custom status will be displayed under the “Custom Statuses” list as shown below:

Custom Statuses

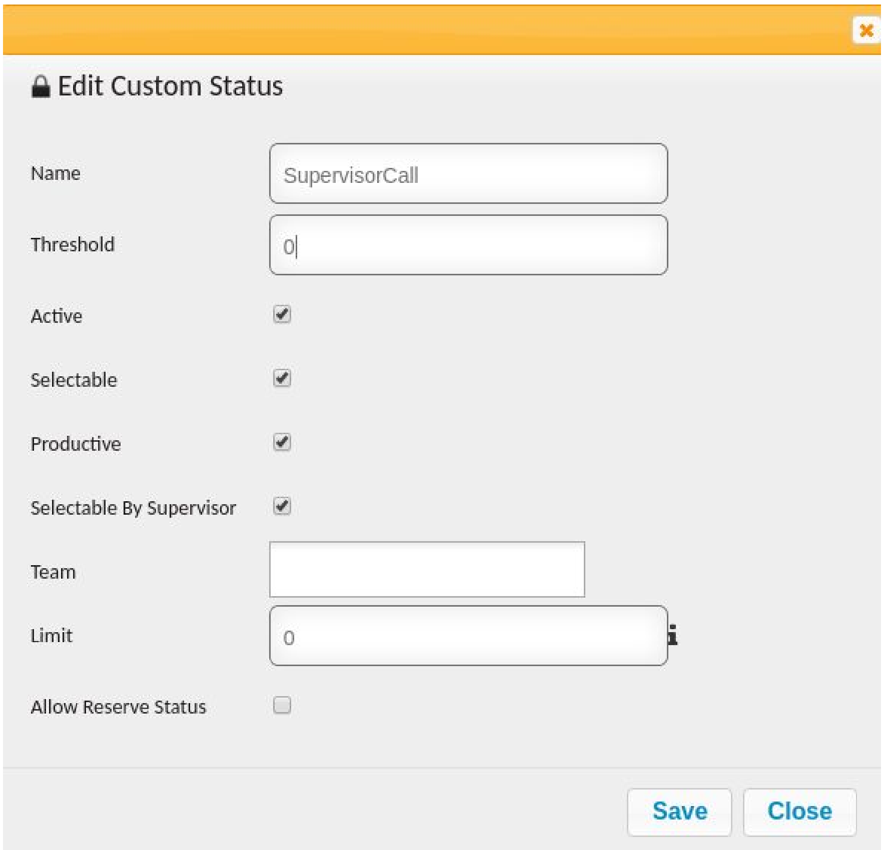
Status	Active	Alert Threshold	Selectable	Productive	Selectable By Supervisor	Limit	Allow Reserve Status	
SupervisorCall	True	0	True	True	True	0	False	
SalesMeeting	True	0	True	True	True	0	False	

Editing a Custom Statuses

1. To edit a custom status, click the edit button, , located on the far right of the "Status Name" as shown below:



After clicking the edit button, , the custom status pop-up window will appear as shown:



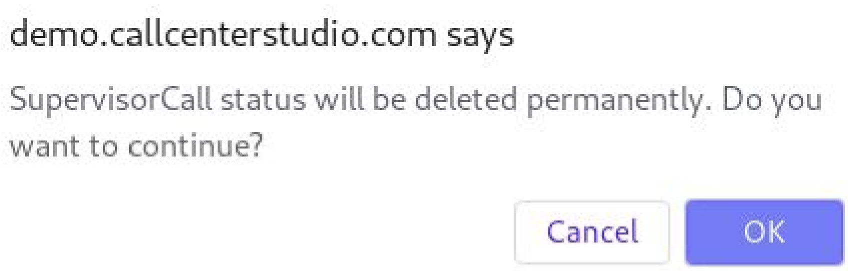
2. Make changes as desired.

3. Once the desired changes have been completed, the information can be saved by clicking the save button, 

.

Deleting a Custom Status

1. From the Custom Statuses list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- *Select the cancel button,* 

, to cancel the deletion.
- *Select the OK button,* 

, to confirm the deletion.

2. Confirm the deletion by clicking the “OK” button, 

.

The screen will reload, and the deleted status will not be shown.

Web URLs

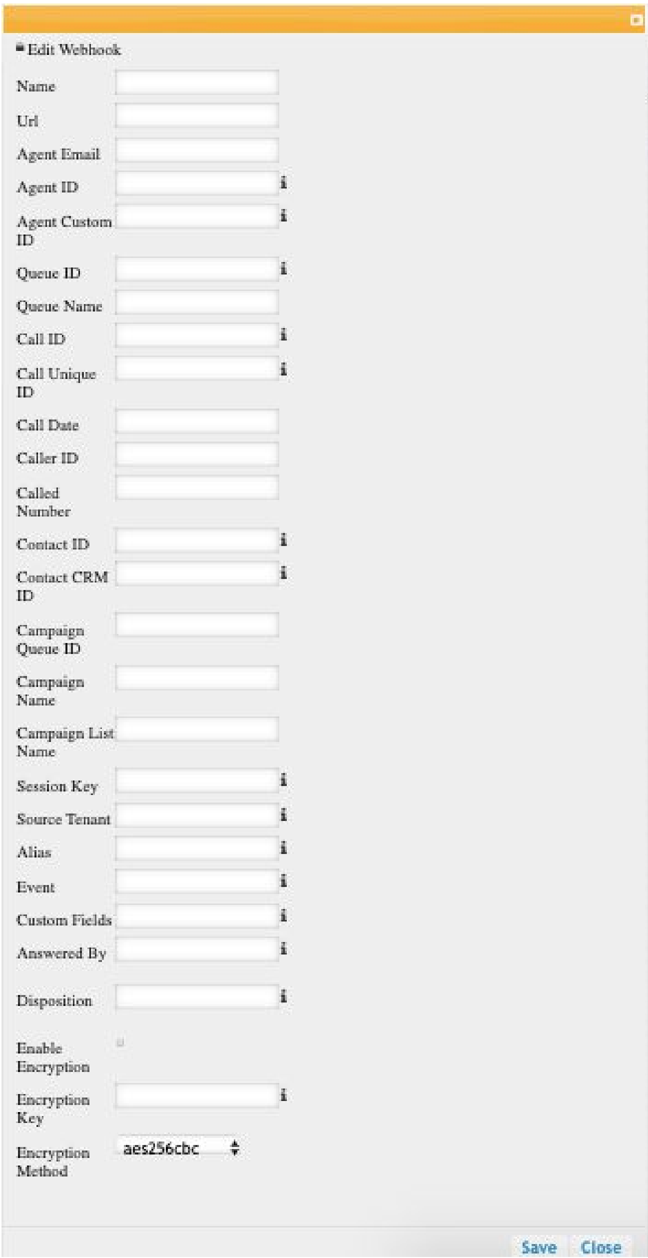
Enables 3rd party applications to be triggered through necessary parameters.

While creating Web URLs, the related address is entered in the URL field. The remaining fields include variable definitions to be sent to the related web service according to the company's needs. If assistance is needed, please contact the assigned Call Center Studio Project.

Adding a Webhook

Note: The "Name" & "Url" input boxes are mandatory fields.

1. Click the New button, , located in the top right corner of the popup screen. The following pop-up screen will appear as shown below:



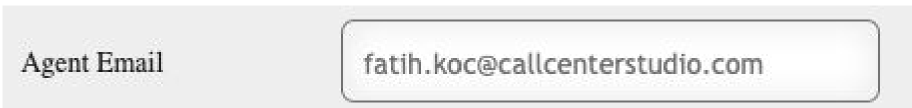
2. Click the “Name” input box, type the new webhook’s name as seen below:

   Note: The “Name” & “Url” input boxes are mandatory fields.

3. Click the “Url” input box, type the webhook’s Url in the layout shown below:

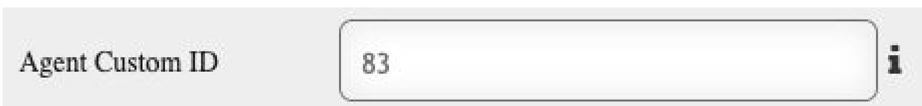
   Note: The “Name” & “Url” input boxes are mandatory fields.

4. Click the “Agent Email” input box, type the agent’s email in the layout shown below:

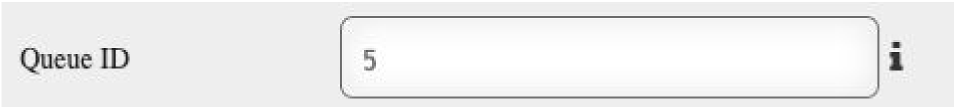


5. Click the “Agent ID” input box, type the agent’s unique ID in the system in the layout shown below:

6. Click the “Agent Custom ID” input box, type the unique ID value given by the user in the layout shown below:



7. Click the “Queue ID” input box, type the queue ID an example is shown below:

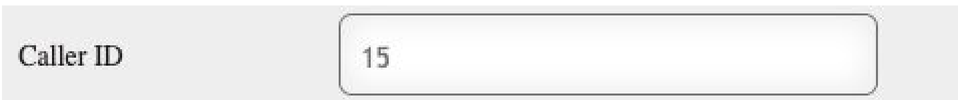


8. Click the “Agent ID” input box, type the Queue’s Name in the layout shown below:

9. Click the “Call ID” input box, type the unique value of the call given by the system in the layout shown below:

10. Click the “Call Unique ID” input box, type the call’s unique ID.
11. Click the “Call Date” input box, type the call’s date in the layout shown below:

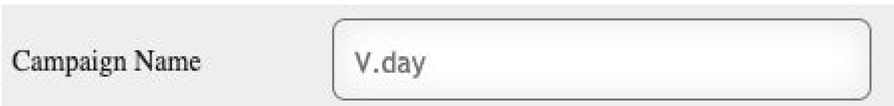
12. Click the “Caller ID” input box, type the caller’s ID in the layout shown below:



13. Click the “Called Number” input box, type the called number.

14. If the call is created due to the campaign call, in the "Contact ID" input box, type the ID value of the contact record that is linked to the campaign call.
15. If the call is created due to a campaign, in the "Contact CRM ID" input box, type the special ID value linked to this call that is given to contact. (e.g., If the contact is going to be paired with 3rd party CRM this may be the ID value in the system)
16. Click the "Campaign Queue ID" input box, type the queue ID of the related campaign. An example is shown below:

17. Click the "Campaign Name" input box, type the name of the related Campaign. An example is shown below:

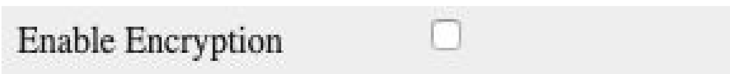


18. Click the "Campaign List Name" input box, type the list name of the related Campaign.
19. Click the "Session Key " input box, type the agent's session key.
20. Click the "Source Tenant" input box, type the first tenant where the call starts in the layout shown below (sometimes a call can circulate multiple tenants)

21. Click the “Alias” input box, type the agent’s internal number in the layout shown below:

22. Click the “Event” input box, type the event transpiring in call notification requests (E.g., ringing, noanswer, hangup, etc.).
23. Click the “Custom Fields” input box, type the additional information in the record of the list loaded during campaign calls (e.g., identity number, address, etc.) in the layout shown below:

24. Click the “Answered By” input box, type the information that is going to be sent in the case of the call’s answering field being full.
25. Click the “Disposition” input box, type the result code coming from the operator at the end of the call when the call is outgoing call or the incoming call is transferred from the IVR.
26. Check the following checkbox to Enable Encryption.

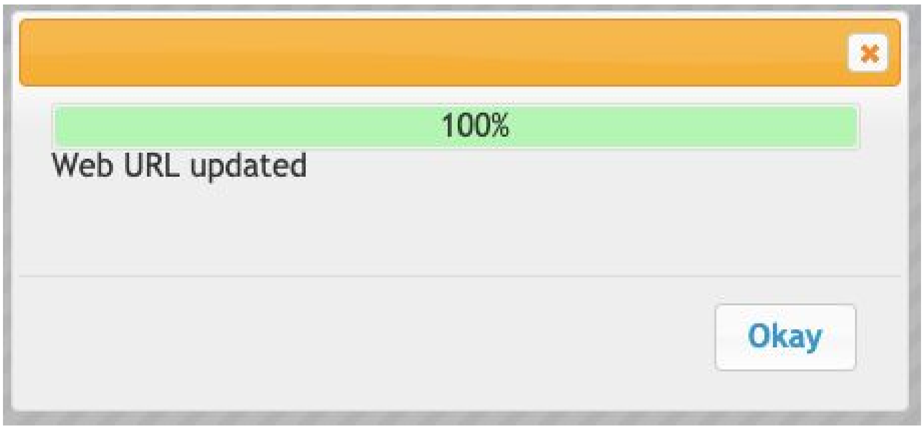


27. Click the “Encryption Key” input box, type the encryption key. (The enciphering information in the browser address bar URL of the agent screen’s pop-up).

28. Click the "Encryption Method" input box and type the encryption method.

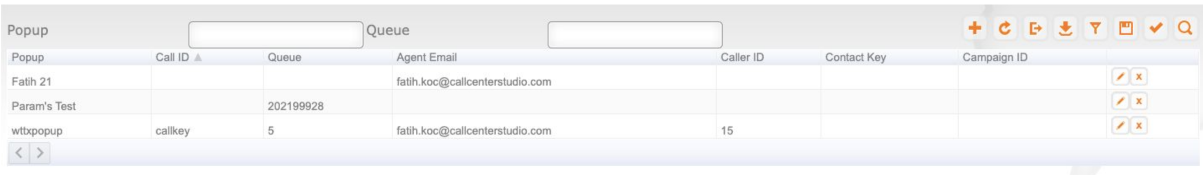
29. After all the desired additions have been made, click the save button, 

, the following pop-up window will appear:



30. Click the Okay button, 

, to acknowledge the addition. The new contact will be located in the contact list as seen below:



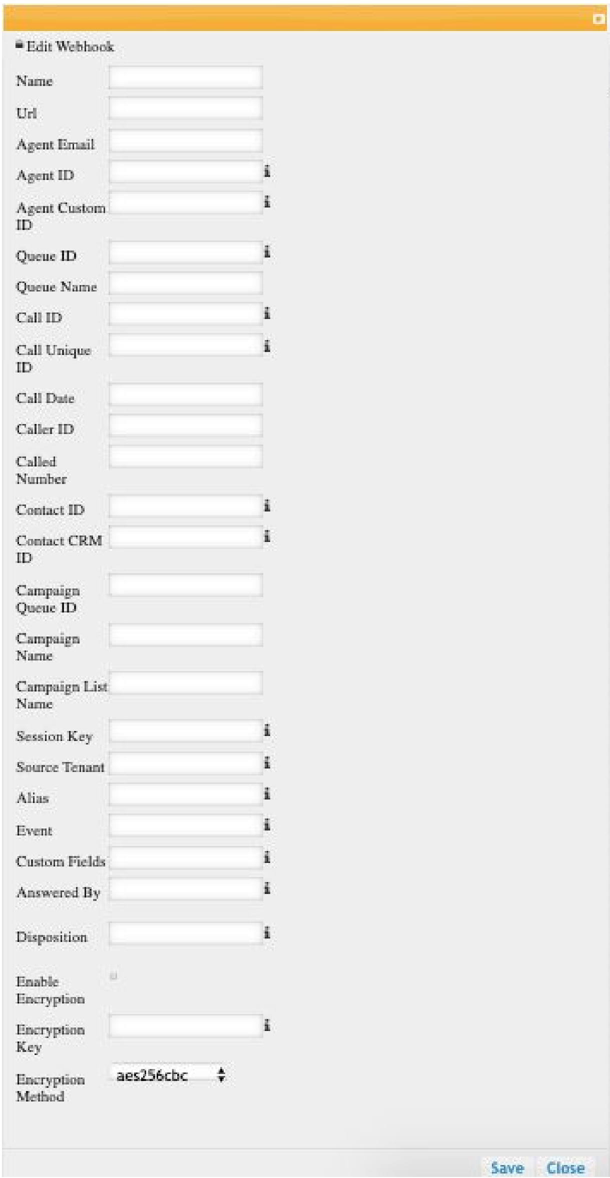
Popup | Queue

Popup	Call ID	Queue	Agent Email	Caller ID	Contact Key	Campaign ID
Fatih 21			fatih.koc@callcenterstudio.com			
Param's Test		202199928				
wttxpopup	callkey	5	fatih.koc@callcenterstudio.com	15		

Editing a Webhook

1. To edit a webhook, click the edit button, , located on the far right of the Webhook Name after the “Campaign ID column” shown below:

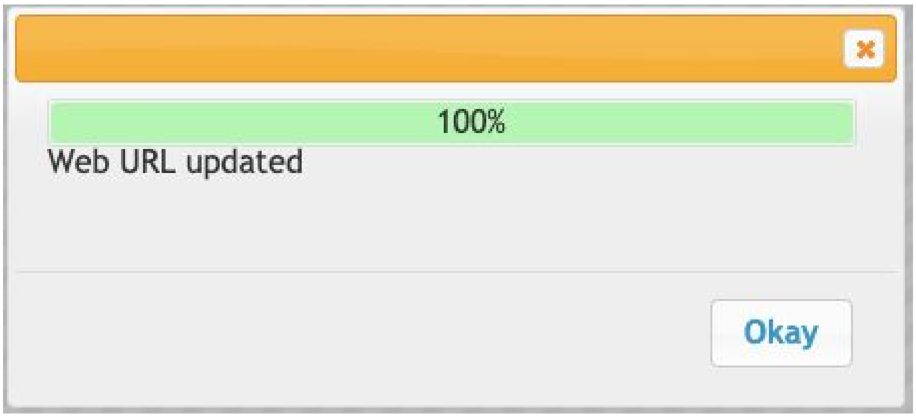
After clicking the edit button, the contact pop-up window will appear as shown:

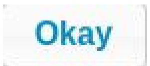


2. Make changes as desired.

3. Once the desired changes have been completed, the information can be saved by clicking the save button, 

, the following pop-up box will appear:



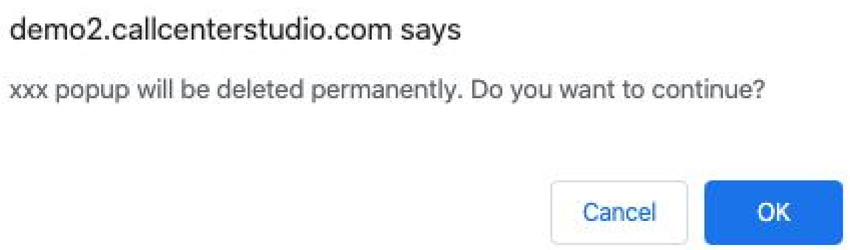
4. Click the Okay button, 

, to confirm the changes.

Deleting a Webhook

1. From the Webhook list, click the delete button, , to the right of the edit button, .

   When the delete button is clicked the following pop-up will appear:

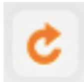


- *Select the "Cancel" button, Cancel, to cancel the deletion.*
- *Select the "OK" button, OK, to confirm the deletion.*

2. Confirm the deletion by clicking the OK button, OK.

The screen will reload, and the deleted webhook will not be shown.

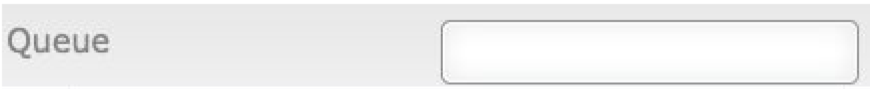
Refreshing the Statuses Page

To refresh the page, click the refresh button, 

Searching for a Webhook

1. *The "Popup" input box can be used to find webhooks quickly:*

2. *The "Queue" input box can be used to find webhooks quickly:*



Setting Webhook

If a pop-up does not open:

- If you have defined pop-up in a queue and the pop-up screen does not open when a call arrives, perform the following:
- If a pop-up is defined in "Queue" settings, please inform the Project Manager using the following address support@callcenterstudio.com.

System Logs

- The place where logs in the system are displayed. There are records of missed calls, the logs in which customer representative status was changed by the supervisor, logs of changes in welcome menus, queues, etc.

Dialplans

Calling rules need to be defined to perform outbound calls through the system.

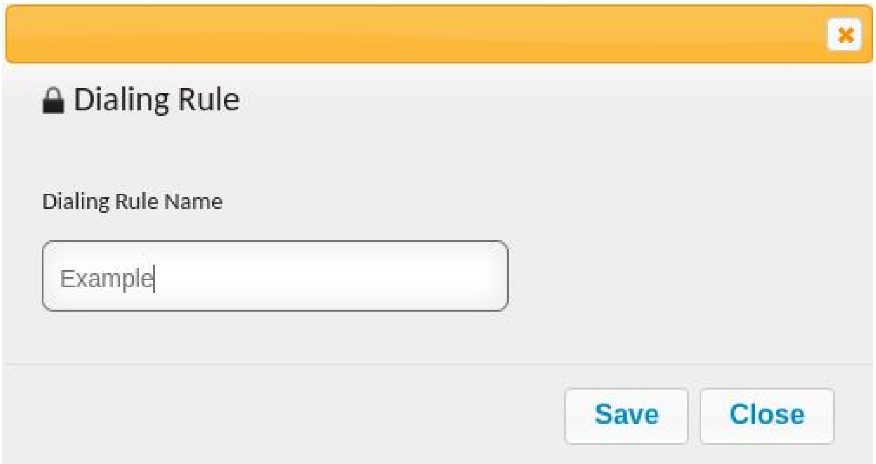
Adding a Dialplan

General Notes

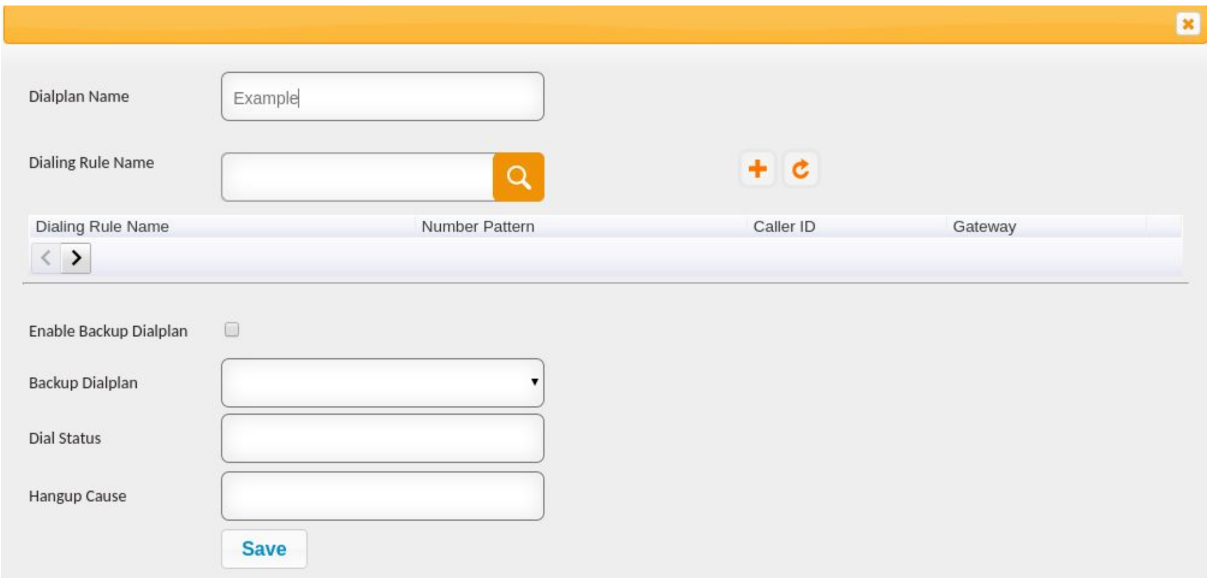
- While calling rules are being defined, pay attention to the format of the phone number through which outbound calls will be made.
- While performing definitions, if a voice record is desired to be kept in the queue, the voice record checkbox should be marked.
- While the alias calling plan is being defined, in the checkmark alias box, write the first digit of the internal number defined for users inside the system in the field of the number to be called and save it.

Note: The "Dialing Rule Name" input box is a mandatory field.

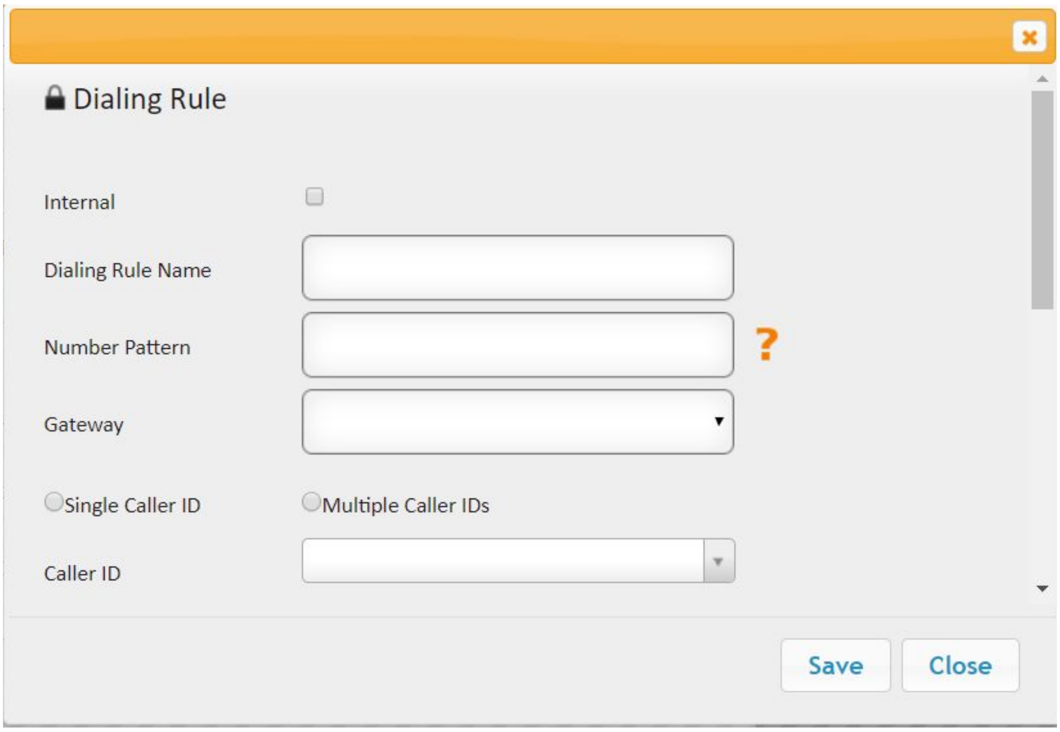
1. Click the "New" button, , located in the top right corner of the screen. The following pop-up screen will appear as shown below, in the "Dialing Rule Name" input box, type the name of the dialing rule:



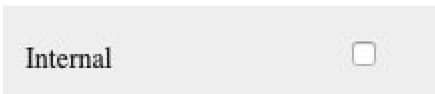
2. Once the preferred name is written, press the save button, , the following pop-up box will appear:



3. Click the New button, , located in the top right corner of the screen, next to the search button. The following pop-up screen will appear, as shown below:

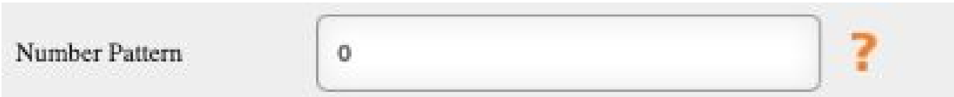


4. Check the following box to make a dialing rule for internal calls.



5. Click the "Dialing Rule Name" input box, type the dialing rule name in the layout shown below:

6. Click the “Number Pattern” input box, type number of the pattern in the layout shown below:



7. For further information, click the question mark, , next to the input box of “number pattern,” then the following website screen will appear as explained on the next page:

Pattern Matching

Pattern matching allows us to create dial plan rule patterns in our dial plan that match more than one possible dialed number. Pattern matching is a time-saving measure. A rule in the dial plan can be created for the numbers that will be dialed.

Special Characters Used in Pattern Matching

Pattern matches always begin with an underscore. Within the pattern, we use various letters and characters to represent sets or ranges of numbers.

X matches any digit from 0-9

Z matches any digit from 1-9

N matches any digit from 2-9

[1237-9] matches any digit or letter in the brackets (in this example, 1,2,3,7,8,9)

[a-z] matches any lower case letter

[A-Z] matches any UPPER case letter

. wildcard, matches one or more characters

! wildcard, matches zero or more characters immediately

Examples

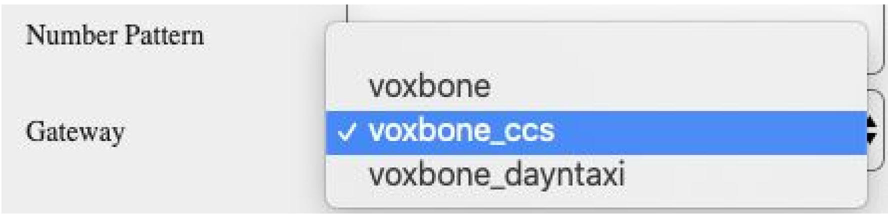
_33XX

_053XXXXXXXX

_05X.

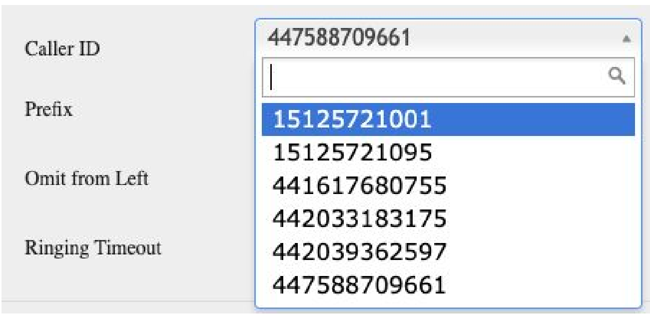
_0216X.

8. Click the "Gateway" section, choose the preferred one for choosing CRM as shown below:



9. Single or multiple caller ID options can be selected here. Only one selection can be made as shown below:

10. Click the desired caller ID, from the dropdown list, if down correctly the selection will look like the picture below:

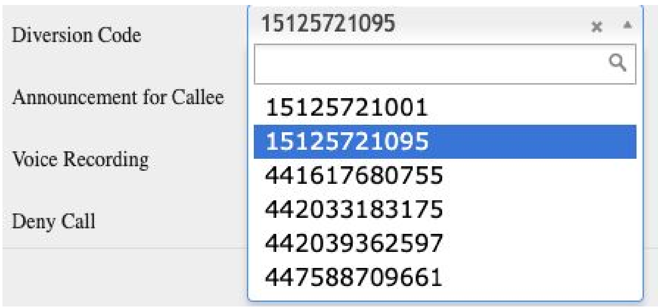


11. Click the "Prefix" input box, type the preferred prefix.

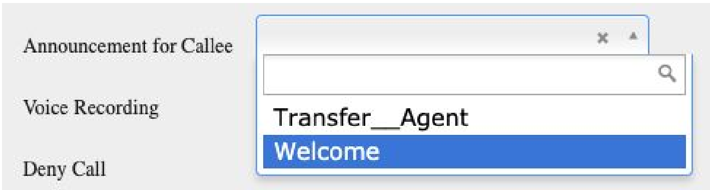
12. This function is used for regulating the usage of numbers. For instance, if the number is 1 737 212 98 66 in the CRM and you type 1 to this section, the tenant will omit the first number from the left and call 737 212 98 66. If you type 0, then it will not omit anything. Click the "Omit from Left" input box, type the number of omissions from left in the layout shown below:

13. Click the "Ringing Timeout" input box, type duration of ringing timeout in seconds in the layout shown below:

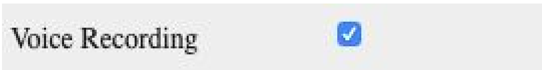
14. Call diversion is a telephony feature of some telephone switching systems, which redirects a telephone call to another destination where the desired called party is available. Click the desired "Diversion Code," from the dropdown list, if down correctly the selection will look like the picture below:



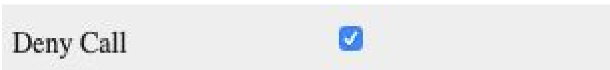
15. Click the desired "Announcement for Callee," from the dropdown list. An example list is shown below (Announcements can be added in the Announcement Section):



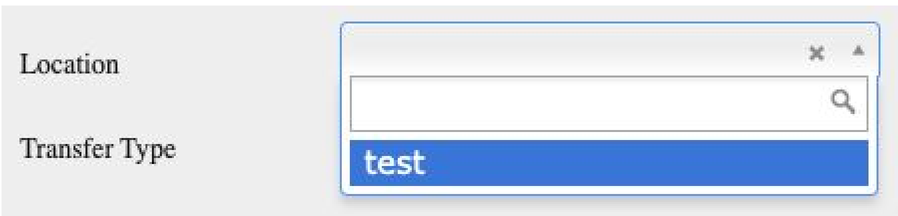
16. Check the following box to enable voice recording in the related dialing rule.



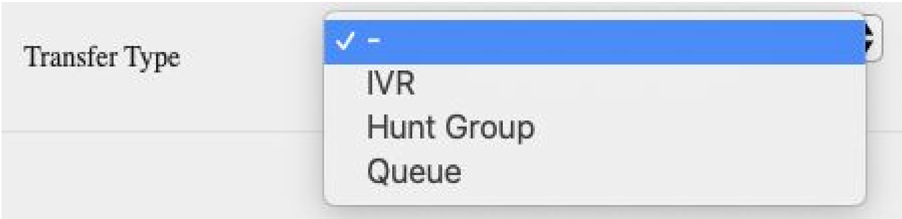
17. Check the following box to enable denying calls in the related dialing rule.



18. Click the desired "Location," from the dropdown list, if down correctly the selection will look like the picture below:

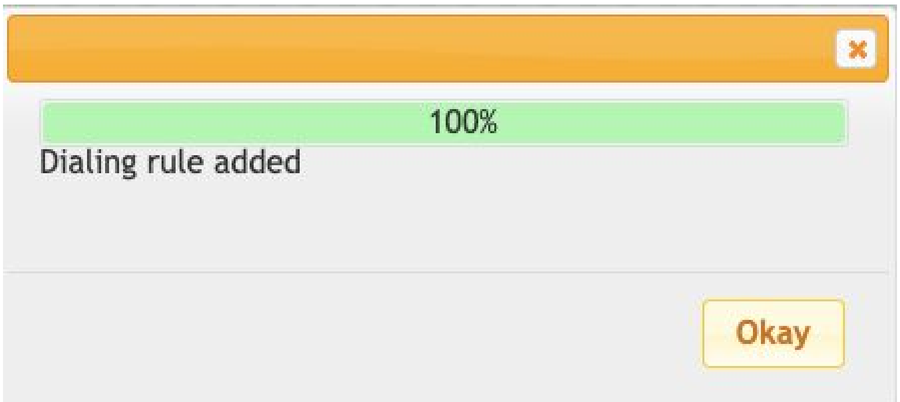


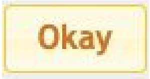
19. Click the desired "Transfer Type," from the dropdown list, if down correctly the selection will look like the picture below:



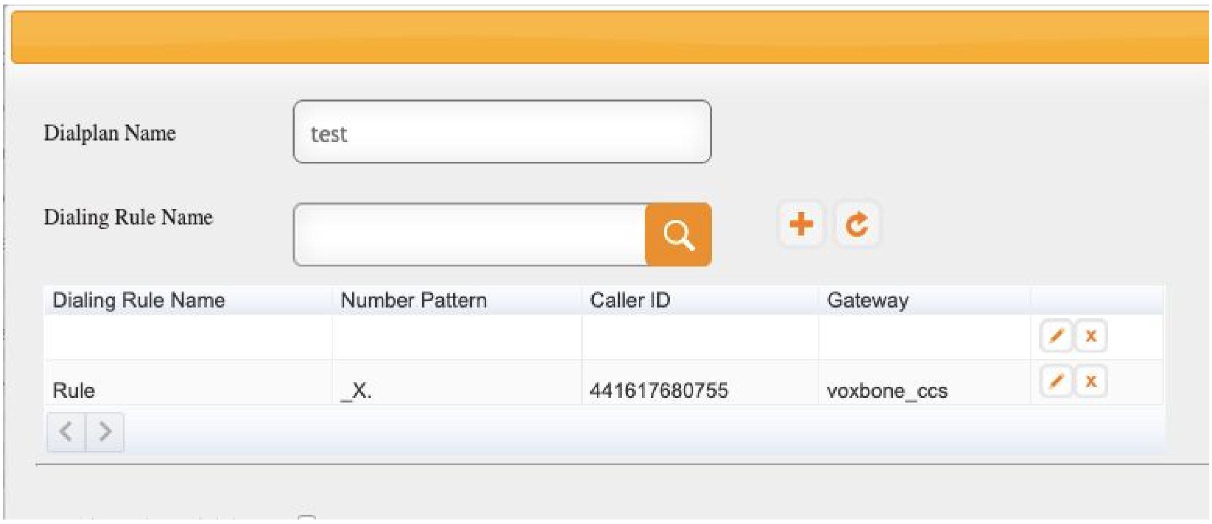
20. After all the desired additions have been made, click the save button, 

, the following pop-up window will appear:

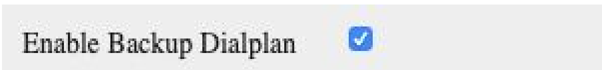


21. Click the Okay button, 

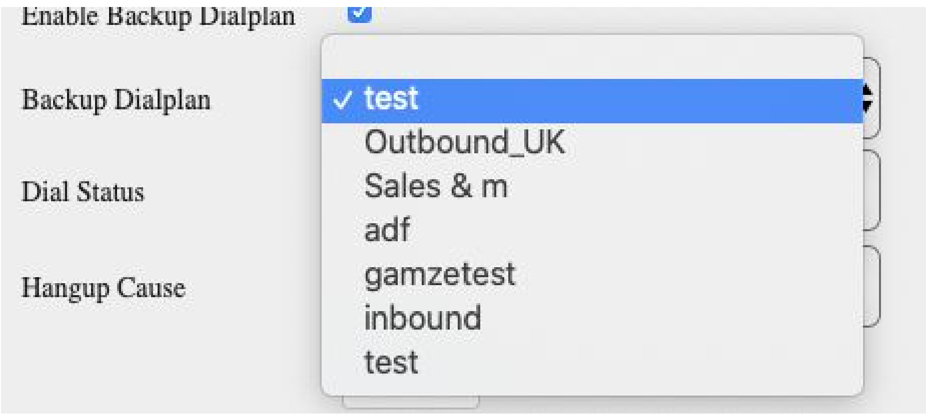
, the new dialing rule will be located in the list as seen below:



22. Check the following box, to enable backup dialplan in the related dialing rule.

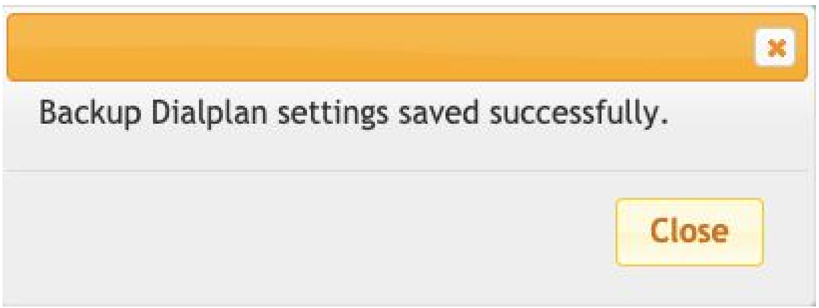


23. Click the desired "Backup Plan," from the dropdown list, an example list is shown below:



24. The Dial Status is the condition to forward the call to the backup dialplan. These are statuses in writing that occurs in the operator tenant based on the call status. Click the “Dial Status” input box, type the preferred dial status.
25. The Hangup Cause is the condition to forward the call to the backup dialplan. It is a numeric value that occurs in the operator tenant, based on the call status. Click the “Hangup Cause” input box, type the preferred hangup cause.
26. After all the desired additions have been made, click the save button, 

, the following pop-up window will appear:



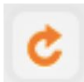
27. Click the Close button, 

, the Backup Dialplan will be located in the list as seen below:

Searching for a Dialing Rule

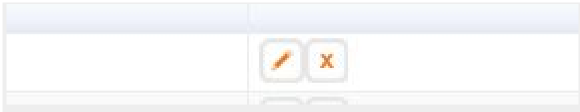
To facilitate ease in searching for dialing rules, the input box to the left of the “Add” button can be used to find dialing rules quickly, as shown below:

Refreshing the Dialing Rules Page

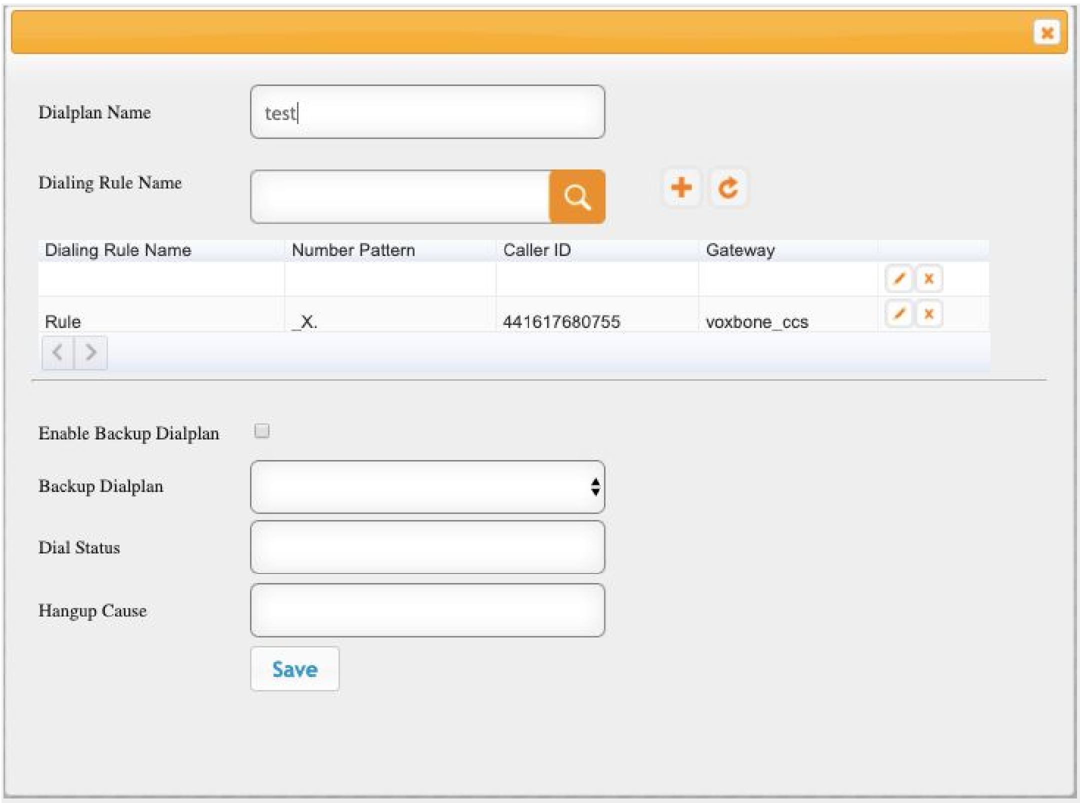
To refreshing the page, click the refresh button, 

Editing a Dialplan

1. To edit a dialplan, click the "Edit" button, , located on the far right of the Dialplan Name as shown below:



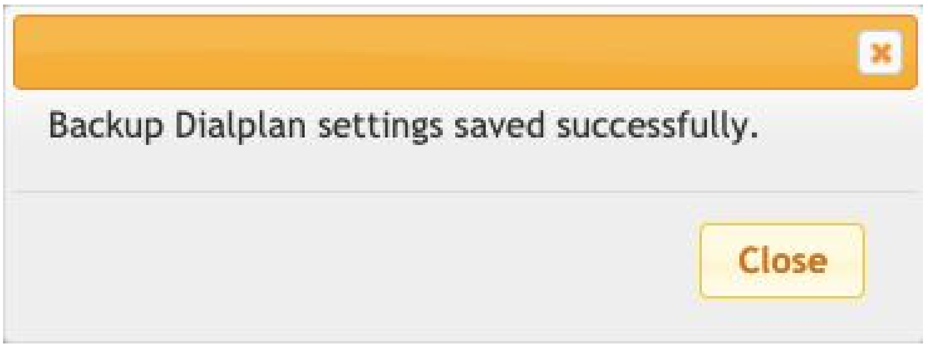
After clicking the edit button, the dialplan pop-up window will appear as shown:



2. Make changes as desired.

3. Once the desired changes have been completed, the information can be saved by clicking the save button, 

, the following pop-up box will appear:



4. Click the “Close” button, 

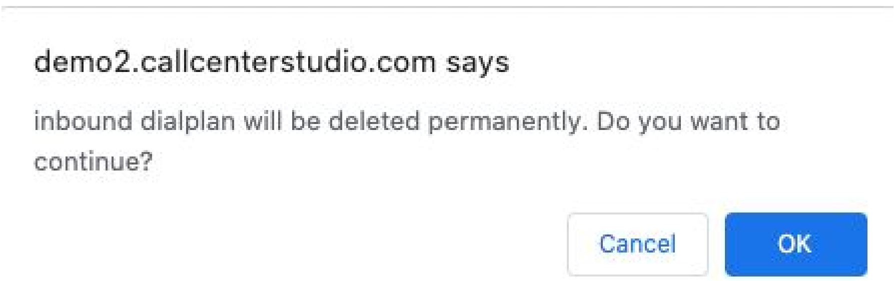
, to confirm the changes.

Searching for a Dialplan Name

1. In the “Dialplan Name” input box, type the desired name or partial name of the desired dialplan.

Deleting a Dialplan

1. From the dialplan list, click the “Delete” button, , to the right of the “Edit” button, . When the delete button is clicked the following pop-up will appear:



- *Select the cancel button, , to cancel the deletion.*
- *Select the OK button, , to confirm the deletion.*

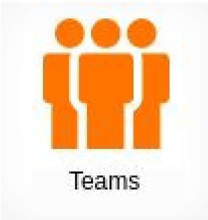
2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted webhook will not be shown.

Refreshing the Dialplan Page

To refreshing the page, click the refresh button, .

Teams



All customer representatives can be gathered under different teams in the system. Customer representatives on the same team can follow one another and send messages to the supervisor of the team. Supervisors can take reports based on the team and send collective messages to users added to the team.

Creating a Team

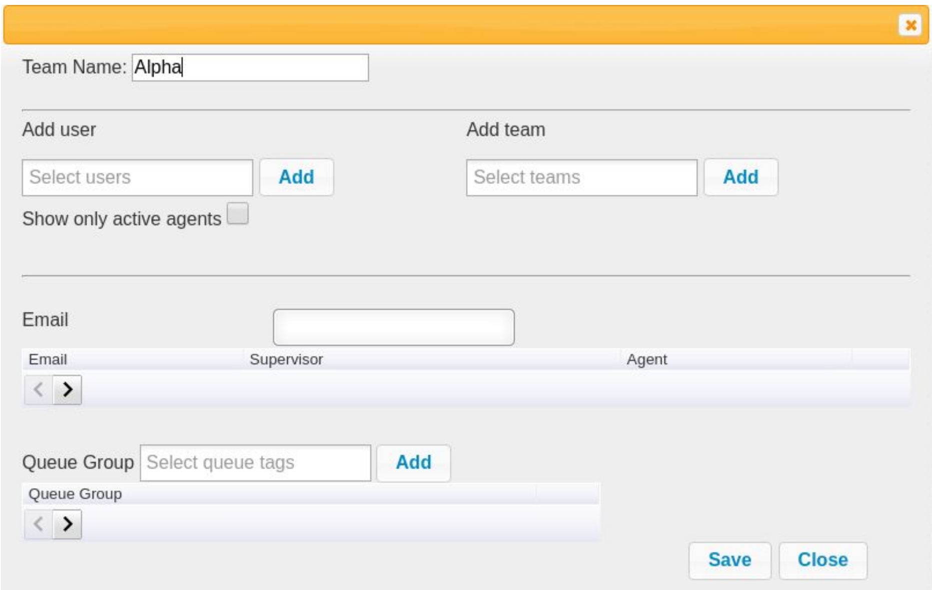
In the input box (in the top left corner of the "Teams module" shown below:

1. Type the name of the team; you wish to create (Ex. Alpha)

2. Press the Create button, 

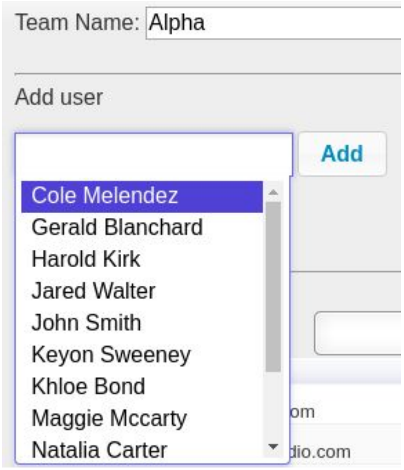
.

Once the Create button is clicked, a pop-up window will appear as shown below:

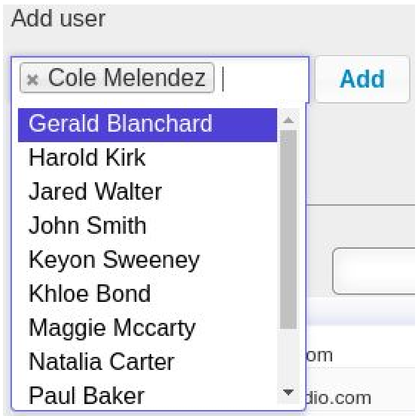


The pop-up window appears for the team name, "Alpha."

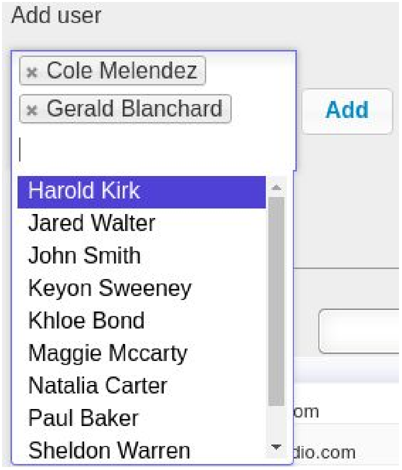
3. Add users to the team by clicking the “Select users” input box, a dropdown list of available users will appear, as shown below:



4. Click the desired user, “Cole Melendez,” from the dropdown list, if down correctly the selection will look like the picture below:

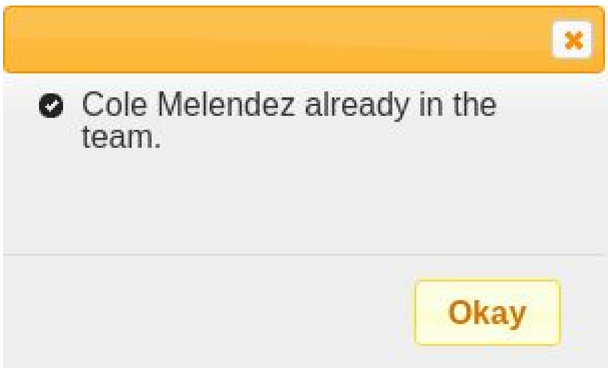


Note: To facilitate speed in adding users, multiple users can be selected, for example, "Gerald Blanchard," can be selected as shown below:



Both of the desired users that were clicked are added to the input box, if a user was clicked by accident the user can be deleted by pressing the, "X," to the left of the user's name:

5. To add the user ("Cole Melendez") to the team, press the add button, , if done correctly the following pop-up window will be displayed:

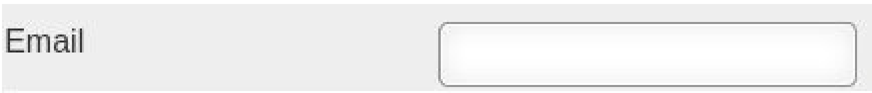


6. Click the Okay button, 

, once the user is added, the user will be listed as shown below:

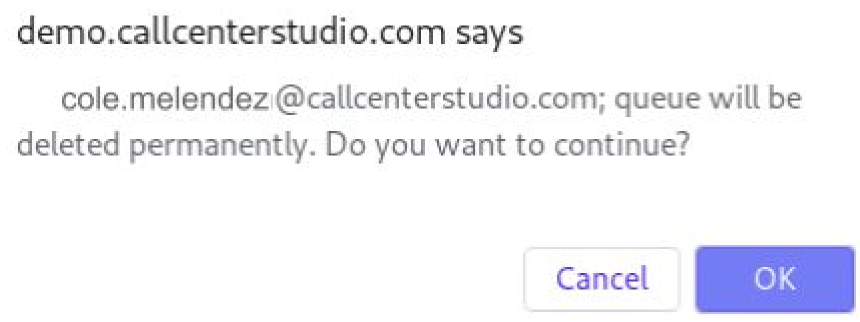
Note: The access level is also listed. In this example, Cole Melendez is both a Supervisor and an Agent indicated by the checkmarks.

To facilitate ease in searching for team members, the input box to the right of Email can be used to find team members quickly, as shown below:



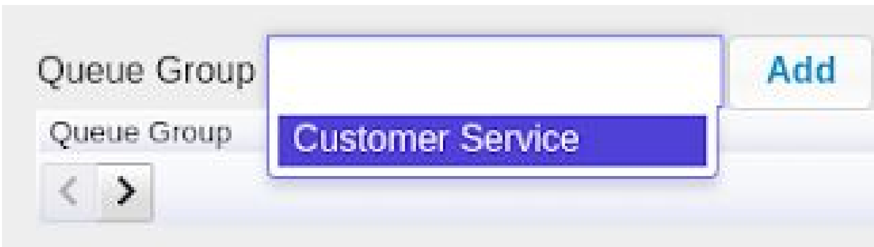
Using this input box, type the user's email to find them within the Team member list easily. Shown below:

Team members can be deleted here as well by pressing, x, to the right of checkmarks. If the, x, is clicked the pop-up below will be shown to confirm the deletion:



- *Selecting the cancel button,* Cancel *, will cancel the deletion.*
- *Selecting the OK button,* OK*, will confirm the deletion.*

7. Once users are added, the team can be added to a queue. Add a team to a queue clicking the "Select queue tags" input box, a dropdown list of available queues will appear, as shown below:



8. Click the desired queue, “Customer Service,” from the dropdown list, if down correctly the selection will look like the picture below:

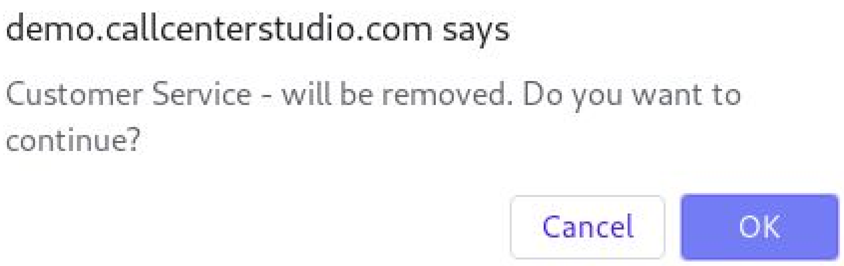
Note:

- *To facilitate speed in adding queues, multiple queues, if created, can also be selected, and added at the same time.*
- *Selected queues can also be deleted similar to users by clicking the, “X”, to the left of the queue name.*

9. To add the queue (“Customer Service”) to the team, press the add button, 

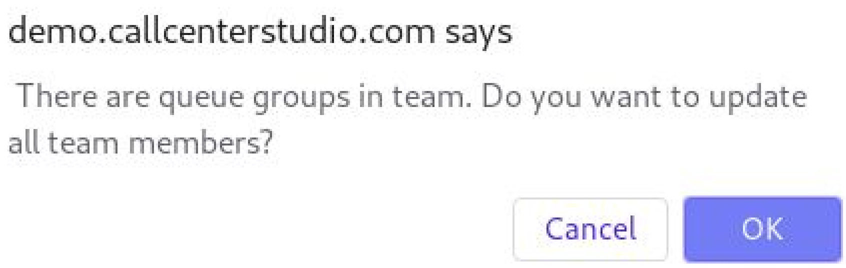
, if done correctly the queue will be displayed under the “Queue Group” list as shown below:

Queues can be deleted here as well by pressing, x*, to the right of the queue name. If the,* x*, is clicked the pop-up below will be shown to confirm the deletion:*



- *Selecting the cancel button,* Cancel *, will cancel the deletion.*
- *Selecting the OK button,* OK*, will confirm the deletion.*

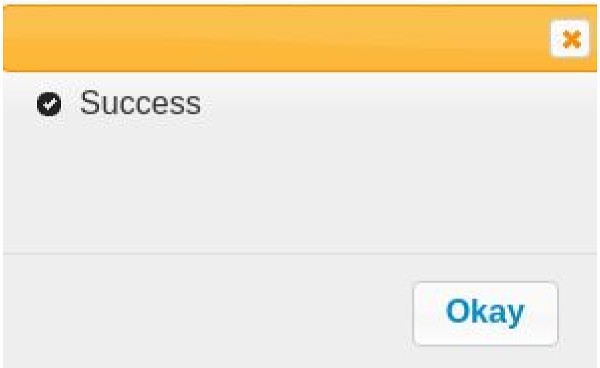
10. Once the user and queue selection is complete, the information can be saved by clicking the save button, Save , the following pop-up box will appear:



11. Click the Ok button, 

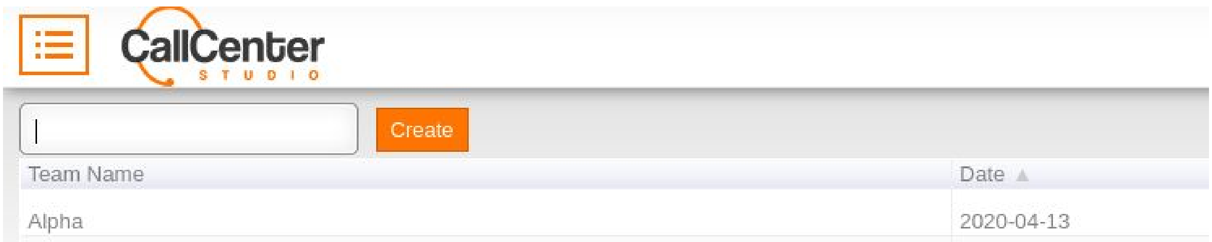
, to confirm the update.

After pressing the Ok button, the following pop-up window will be displayed to acknowledge the addition of the team:



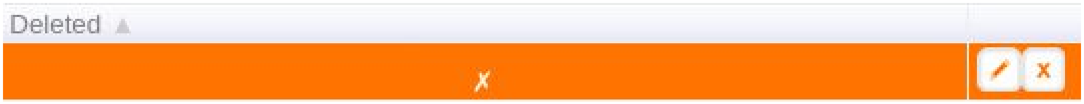
12. Click the Okay button, 

, the new team will be added to the Team Name list as shown below:

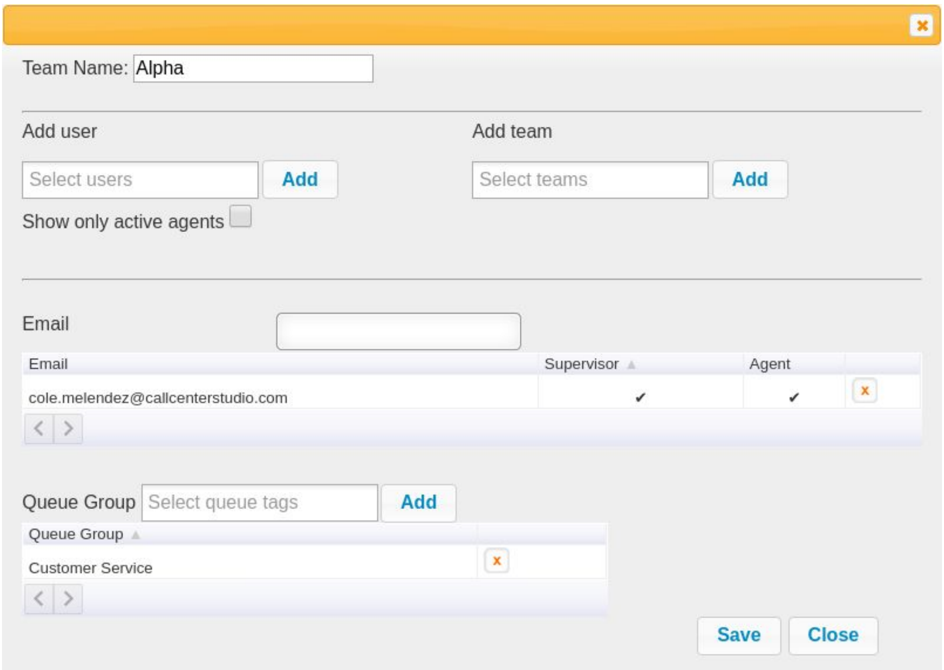


Editing a Team

1. To edit a team, click the edit button, , located on the far right of the Team Name after the "Deleted Column" as shown below:



After clicking the edit button, the team pop-up window will appear as shown:

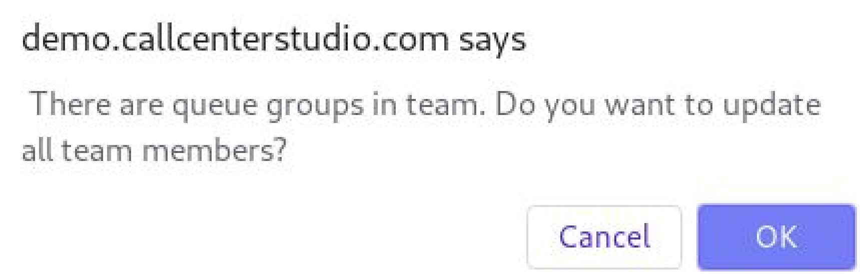


All edits can be made using this pop-up window, such as adding and changing users and teams.

2. Make changes as desired.

3. Once the desired changes have been completed, the information can be saved by clicking the save button, 

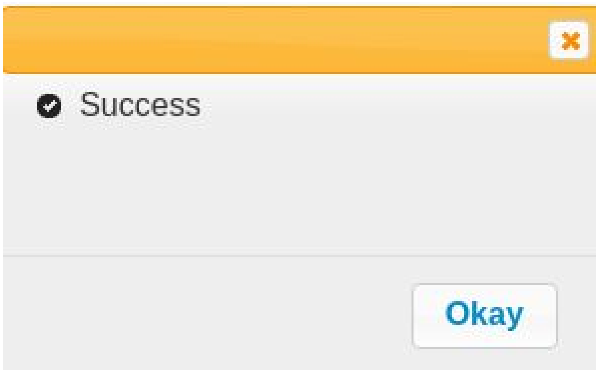
, the following pop-up box will appear:

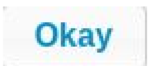


4. Click the Ok button, 

, to confirm the update.

After pressing the Ok button, the following pop-up window will be displayed to acknowledge the changes to the team:



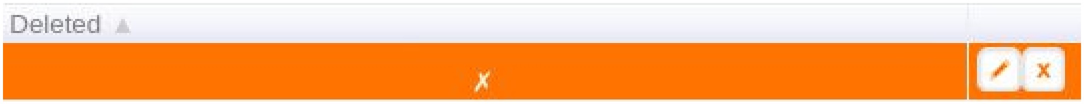
5. Click the Okay button, 

, to confirm the changes.

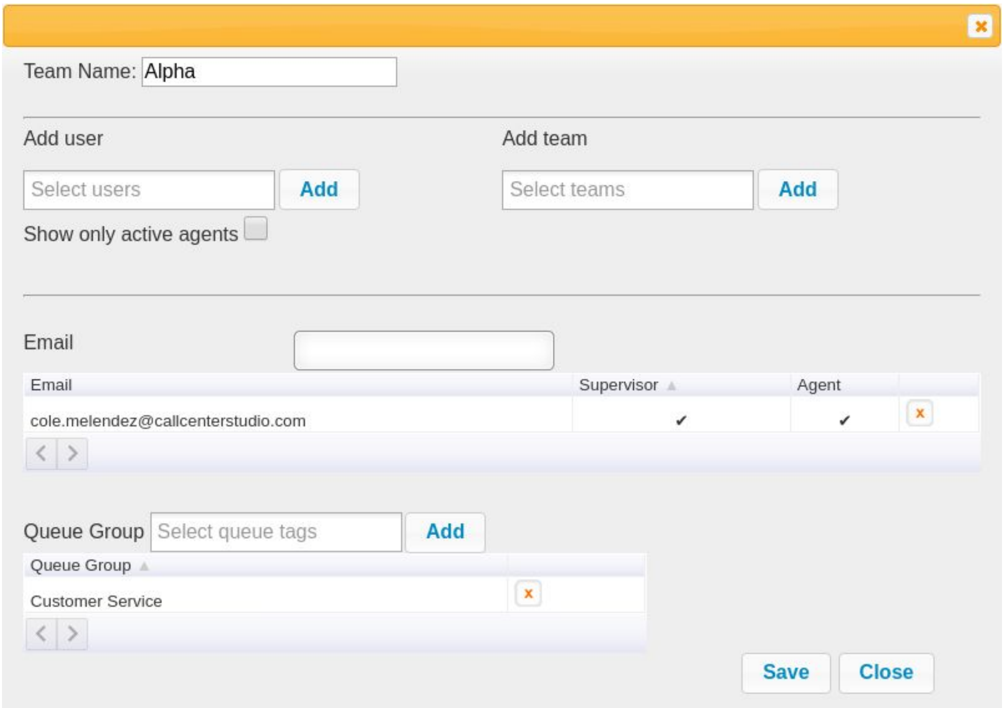
Adding another Team to an Existing Team

Team members from an existing team can be added to another team using the process outlined below:

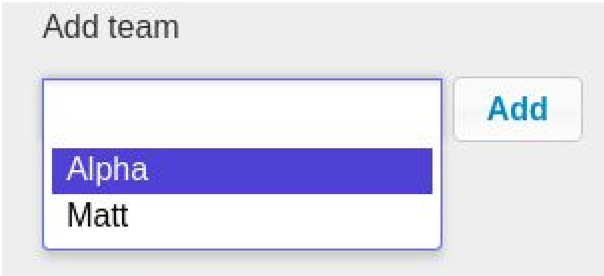
1. Click the edit button, , located on the far right of the Team Name after the "Deleted Column" as shown below:



After clicking the edit button, the team pop-up window will appear as shown:



2. Within the team, another team can be added. Add a team to an existing team by clicking the "Select teams" input box, a dropdown list of available teams will appear, as shown below:



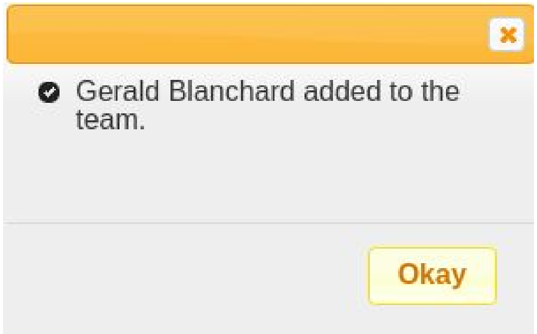
3. Click the desired team, "Matt," from the dropdown list, if down correctly the selection will look like the picture below:

Note:

- *To facilitate speed in adding teams, multiple teams, if created, can also be selected, and added at the same time.*
- *Selected teams can also be deleted, similar to users, by clicking the, "X", to the left of the team name.*

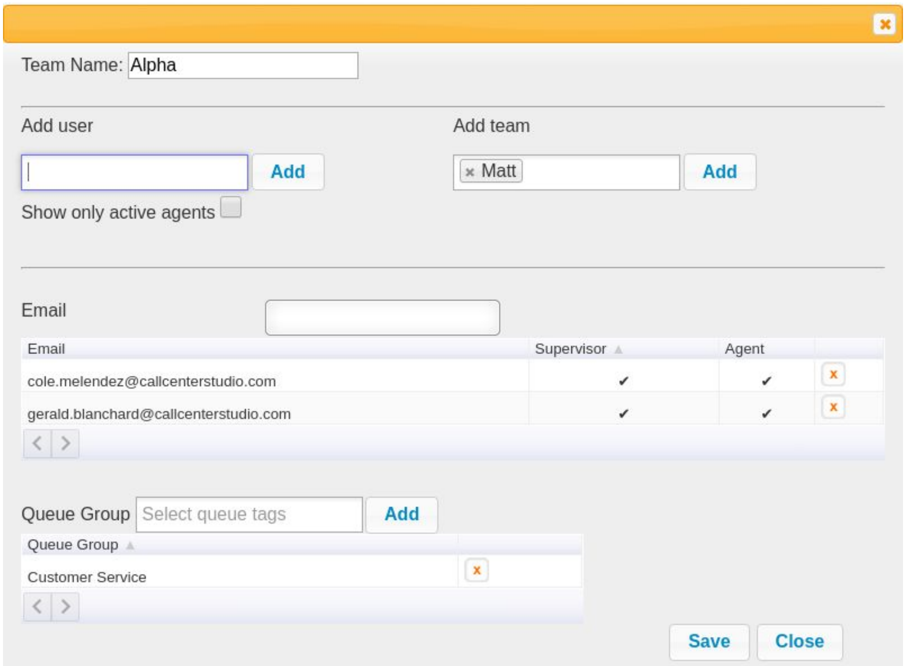
4. To add the team ("Matt") to the team, press the add button, 

, if done correctly, the team members will be displayed in a pop-up confirmation window as shown below:



5. Click the Okay button, 

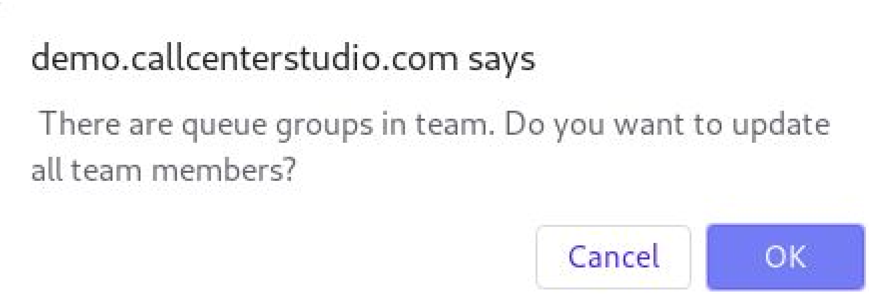
, to confirm the changes. The team members from the added team, "Matt," will be displayed with the team members from "Alpha," as shown below:



As seen above, gerald.blanchard@callcenterstudio.com (from team "Matt") was added to team Alpha's member list.

6. Once the desired changes have been completed, the information can be saved by clicking the save button, 

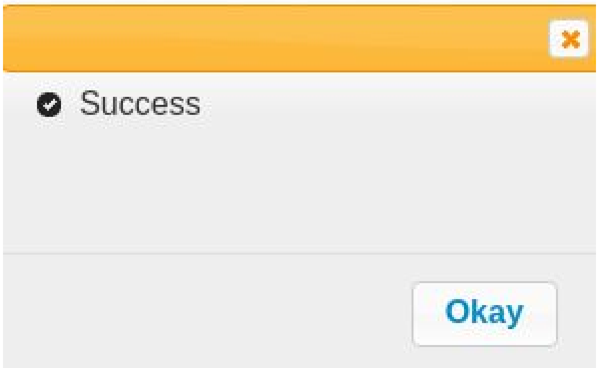
, the following pop-up box will appear:

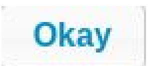


7. Click the Ok button, 

, to confirm the update.

After pressing the Ok button, the following pop-up window will be displayed to acknowledge the changes to the team:

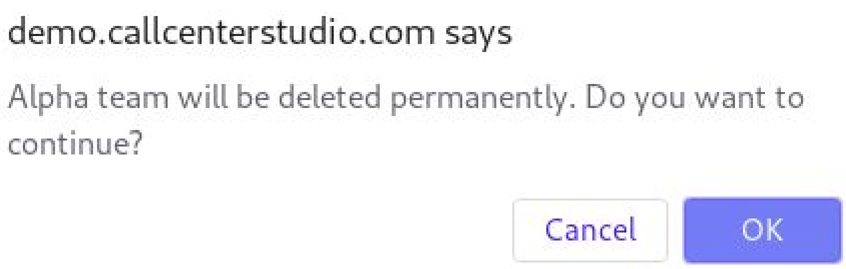


8. Click the Okay button, 

, to confirm the changes.

Deleting a Team

1. From the Team Name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- *Selecting the cancel button,* Cancel *, will cancel the deletion.*
- *Selecting the OK button,* OK*, will confirm the deletion.*

2. Confirm the deletion by clicking the OK button, OK.

The screen will reload, and the deleted team will not be shown.

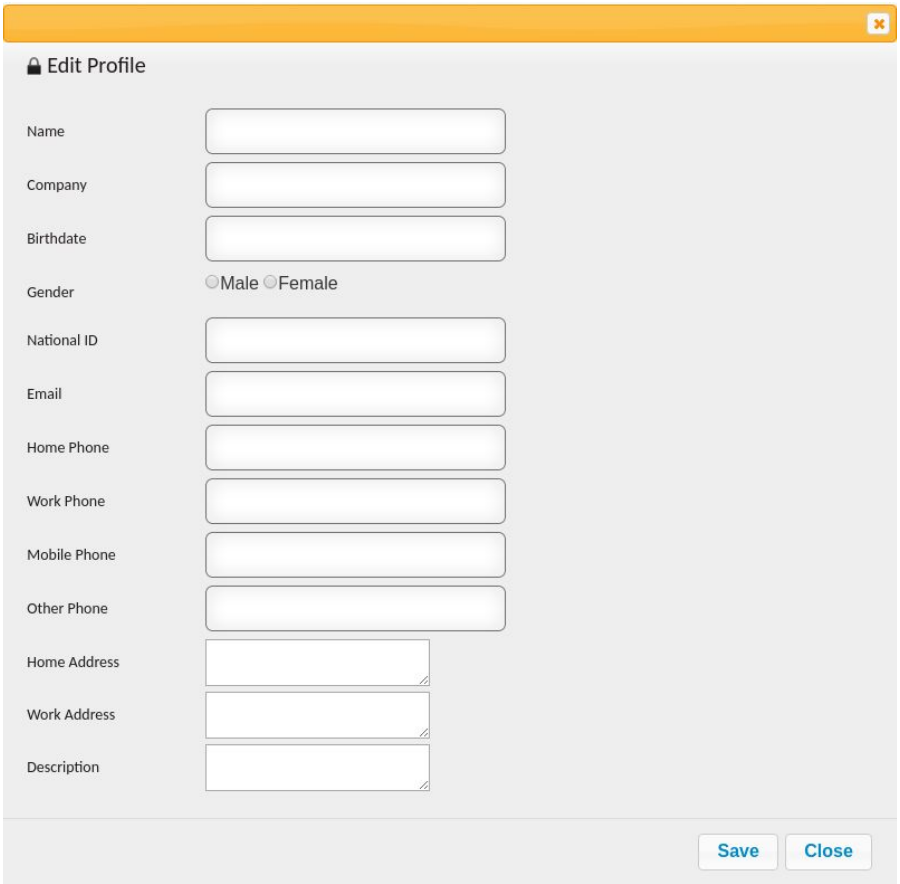
Contacts

For quick and easy transfers using the contact list from the agent screen, Administrators can add, change, and modify contacts within the contacts screen.

Adding a Contact

Note: The "Name" & "Email" input boxes are mandatory fields (See **Contact Quick Add** *Section to quickly add a contact if you need more information regarding adding phone numbers, and other contact information, use the following steps).*

1. Click the New button, , located in the top right corner of the contact screen; the following pop-up screen will appear below:

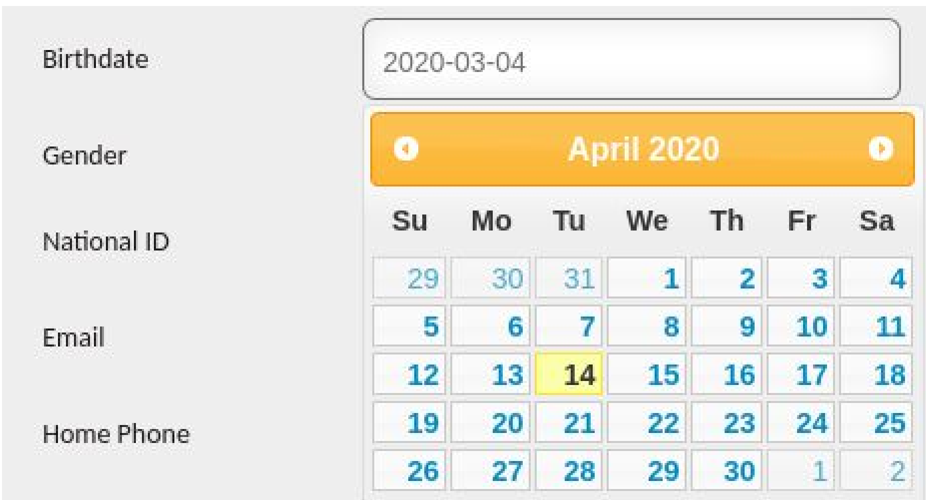


2. Starting from the top, in the "Name" input box, type the new contact's first and last name as seen below:

Note: The "Name" & "Email" input boxes are mandatory fields (See Contact Quick Add Section

3. In the "Company" input box, type the contact's company's name, as demonstrated below:

4. Click the birthdate input box; dates have to be entered using the following format: YYYY-DD-MM. A calendar will also appear to assist in selecting the contact's accurate birthdate, as shown below:



5. Select a gender; two selections can be made, as shown below:

6. In the "National ID" input box, the contact's nationality can be typed in as demonstrated below:

7. In the "Email" input box, type the contact's email address as shown below:

8. In the "Home Phone" input box, type the contact's home phone number:

Note: Phone numbers need to be inputted in the number format designated in the dialing rules. See Dialplans for determining proper number format.

9. In the "Work Phone" input box, type the contact's work phone number:

Note: Phone numbers need to be inputted in the number format designated in the dialing rules. See Dialplans for determining proper number format.

10. In the "Mobile Phone" input box, type the contact's mobile phone number:

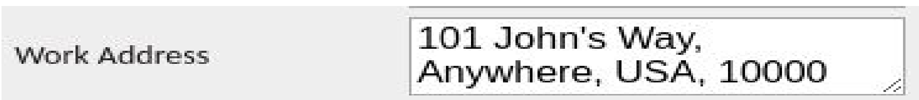
Note: Phone numbers need to be inputted in the number format designated in the dialing rules. See Dialplans for determining proper number format.

11. In the "Other Phone" input box, type the contact's other phone number:

Note: Phone numbers need to be inputted in the number format designated in the dialing rules. See Dialplans for determining proper number format.

12. In the "Home Address" input box, type the contact's home address, an example is shown below:

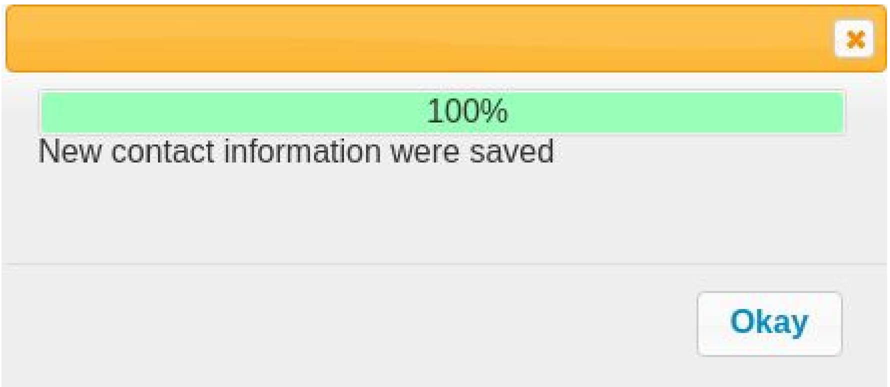
13. In the "Work Address" input box, type the contact's work address, an example is shown below:



14. In the “Description” input box, type a description, an example is shown below:

15. After all the desired additions have been made, click the save button, 

, the following pop-up window will appear:

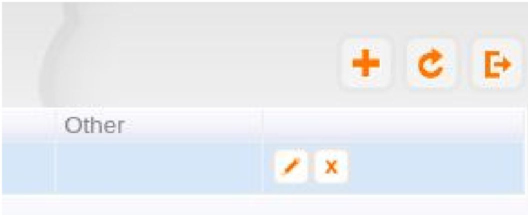


16. Click the Okay button, 

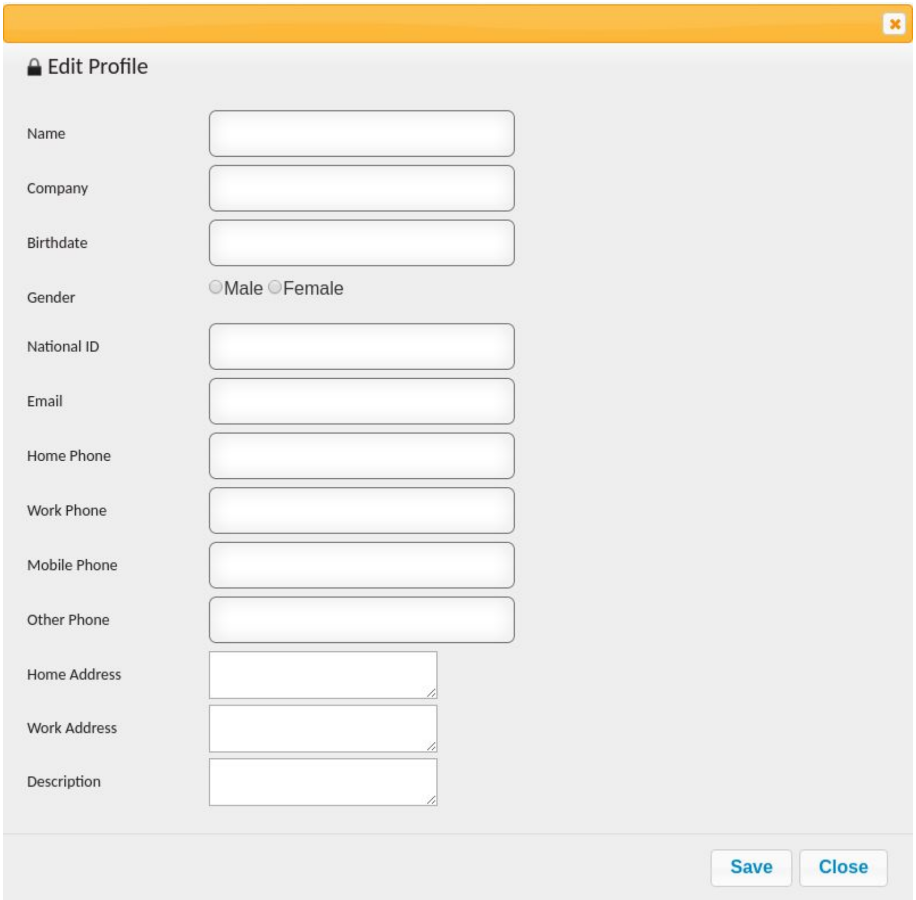
, to acknowledge the addition; the new contact will be located in the contact list as seen below:

Editing a Contact

1. To edit a contact, click the edit button, , located on the far right of the Contact Name after the "Other Column" as shown below:



After clicking the edit button, the contact pop-up window will appear as shown:

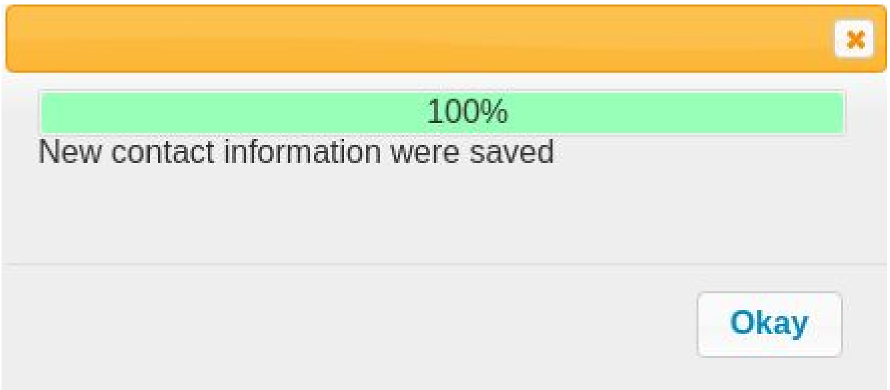


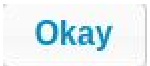
All edits can be made using this pop-up window, such as adding and changing contact information.

2. Make changes as desired.

3. Once the desired changes have been completed, the information can be saved by clicking the save button, 

, the following pop-up box will appear:

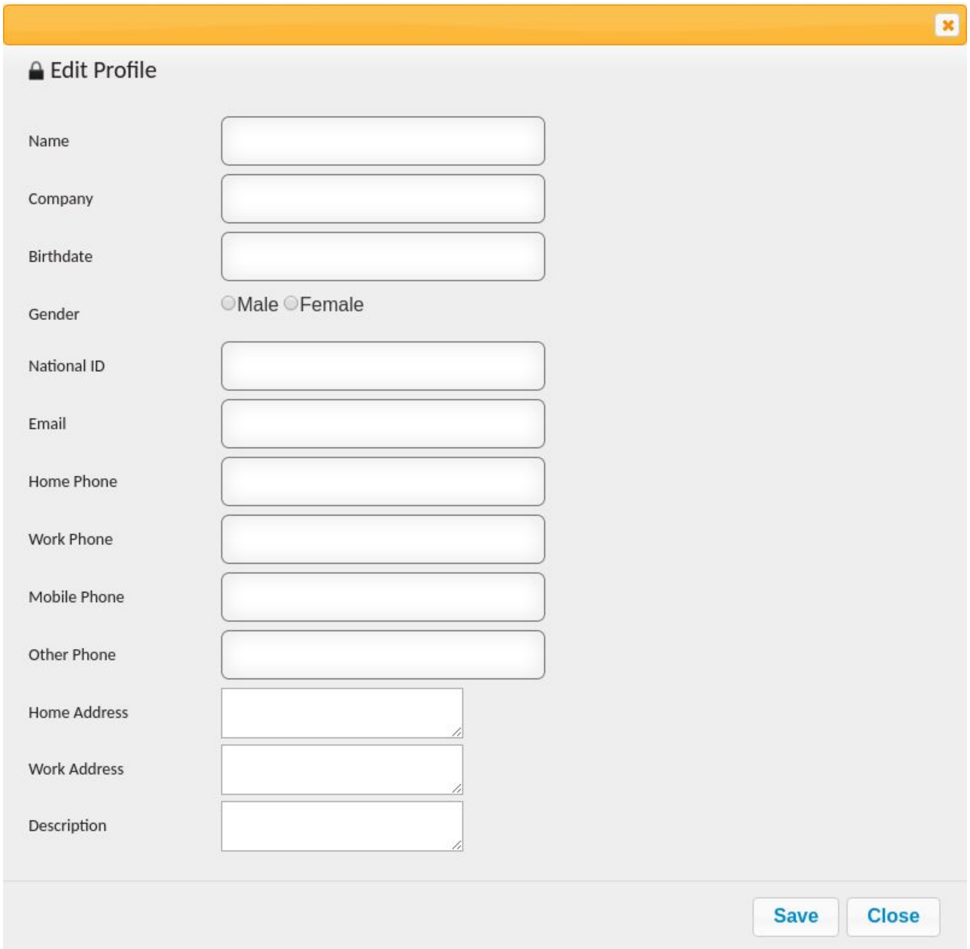


4. Click the Okay button, 

, to confirm the changes.

Contact Quick Add

1. Click the New button, , located in the top right corner of the contact screen; the following pop-up screen will appear as shown below:



2. In the "Name" input box, type the new contact's first and last name as seen below:

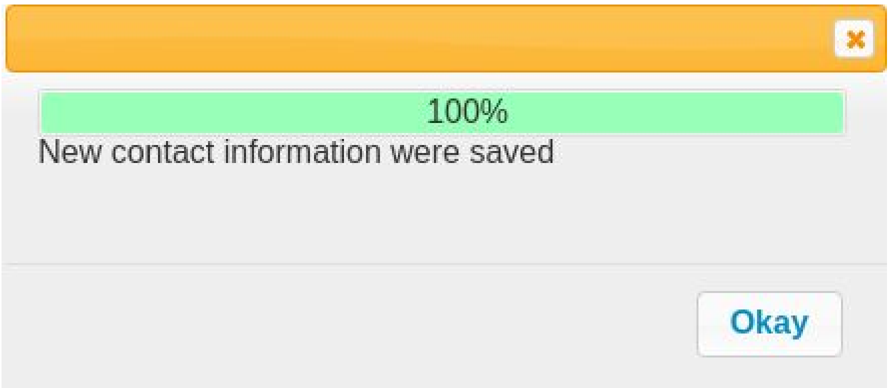
3. In the “Email” input box, type the contact’s email address as shown below:

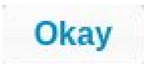
“Name” and “Email" are mandatory fields; other information can be inputted if desired.

4. Add additional contact information as desired (Refer to the **Adding a Contact** section)

5. After all the desired additions have been made, click the “Save” button, 

, the following pop-up window will appear:

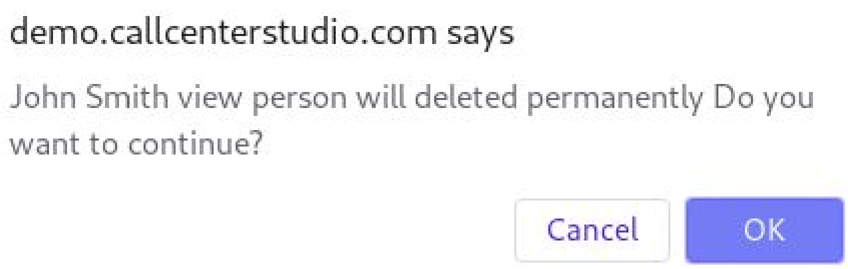


6. Click the “Okay” button, 

, to confirm the changes.

Deleting a Contact

1. From the Contact Name list, click the delete button, , to the right of the edit button, . When the delete button is clicked, the following pop-up will appear:



- *Selecting the cancel button,* Cancel *, will cancel the deletion.*
- *Selecting the OK button,* OK*, will confirm the deletion.*

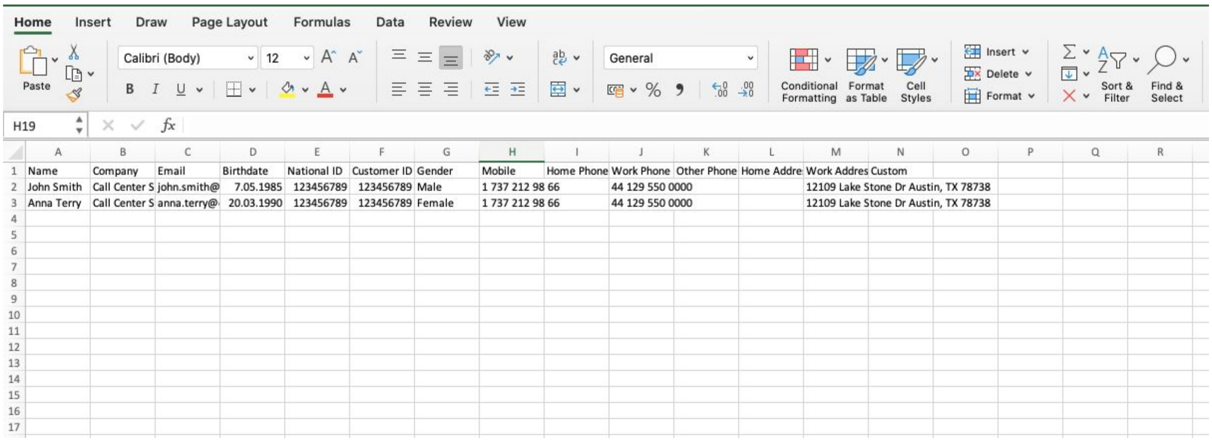
2. Confirm the deletion by clicking the OK button, OK.

The screen will reload, and the deleted team will not be shown.

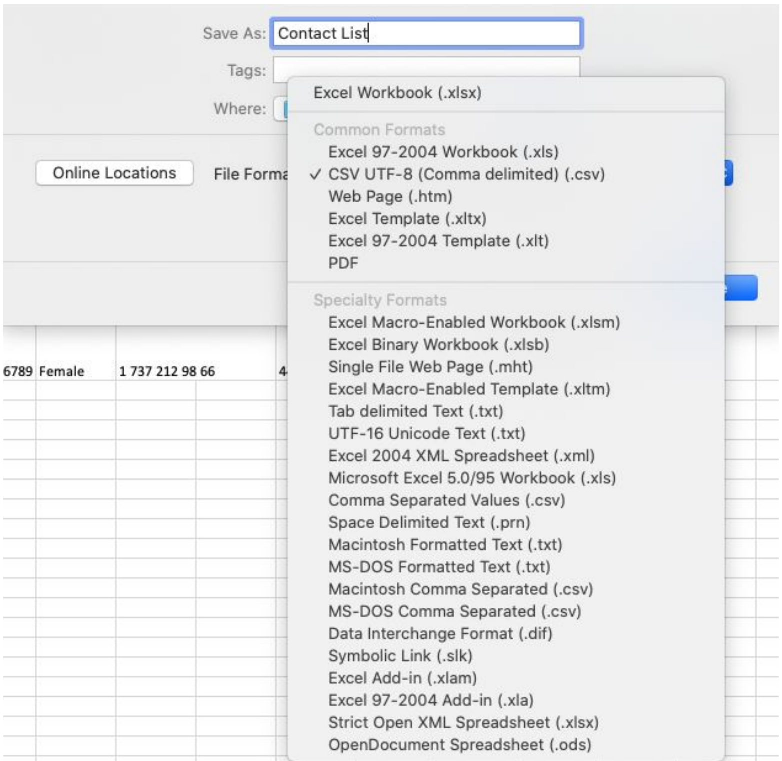
Importing a Contact List

A contact list can be imported to facilitate the quick addition of large quantities of contacts.

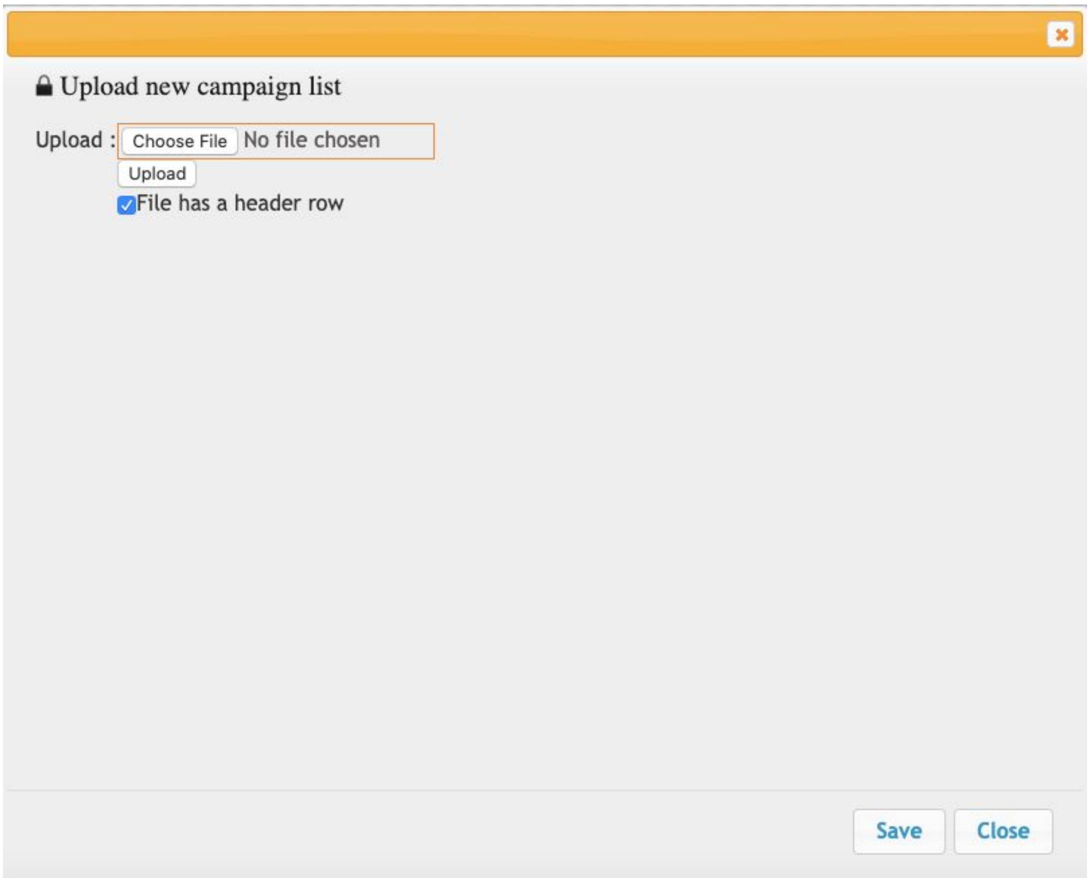
1. Write your Contact List in an excel sheet, as shown below.



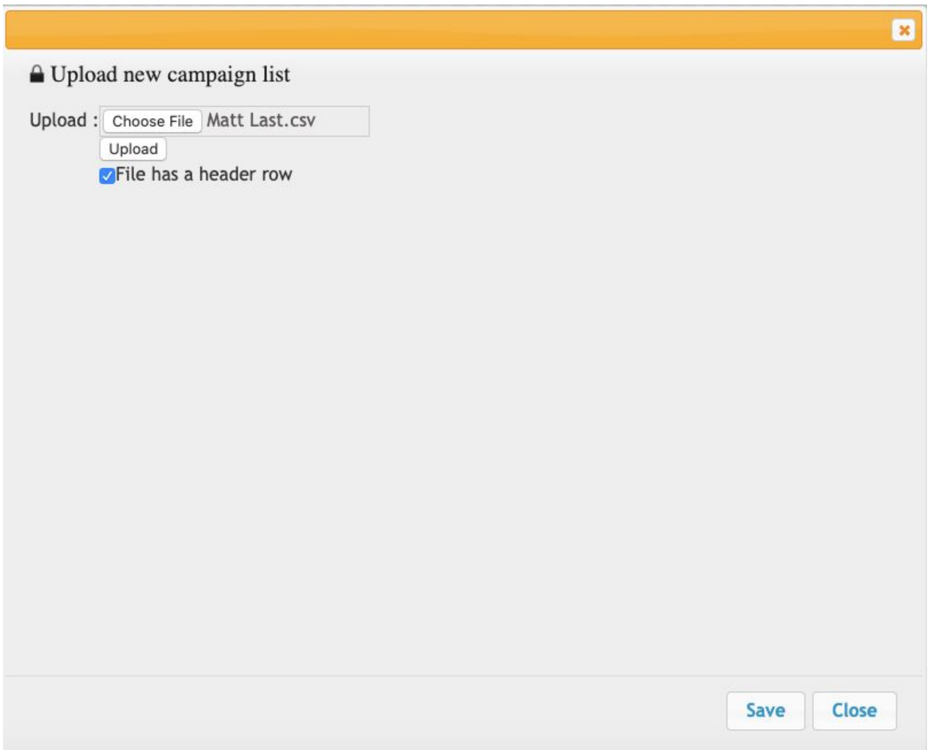
2. Go to "File> Save as" and save it in a CSV UTF-8 Format, as shown below.



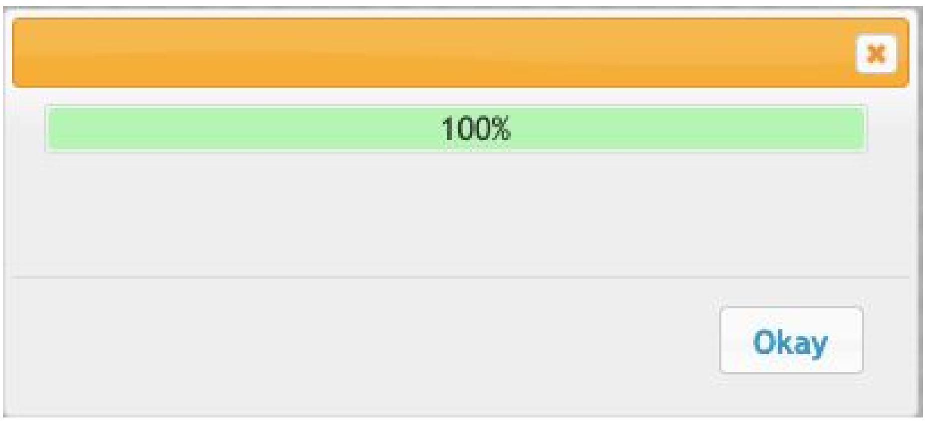
3. Click the import button, , located in the top right corner of the contact screen; the following pop-up screen will appear as shown below:

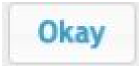


4. Click the “Choose file” button and choose the saved file described above in a CSV UTF-8 format.

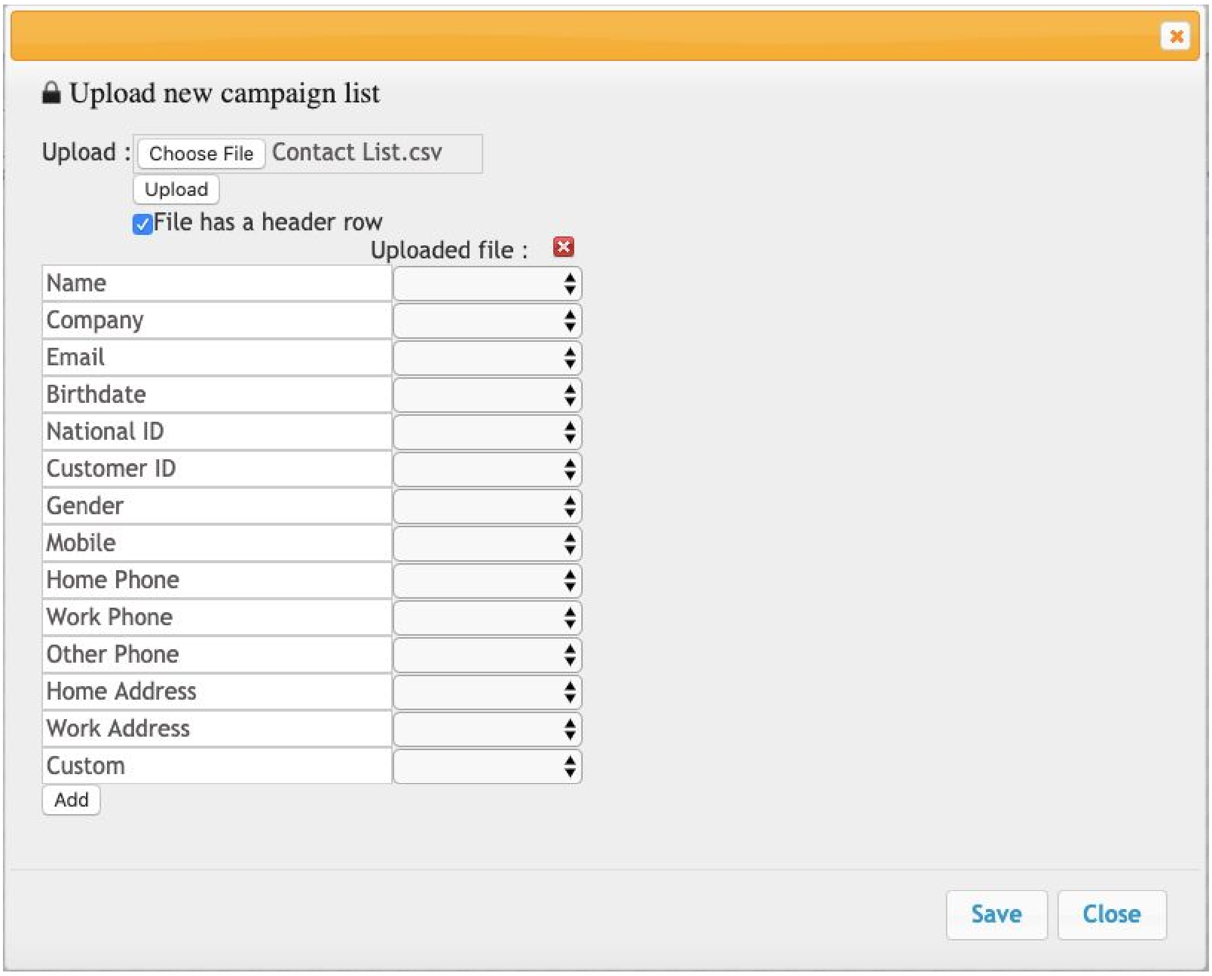


5. Click the upload button; then the following pop-up screen will appear as shown below:

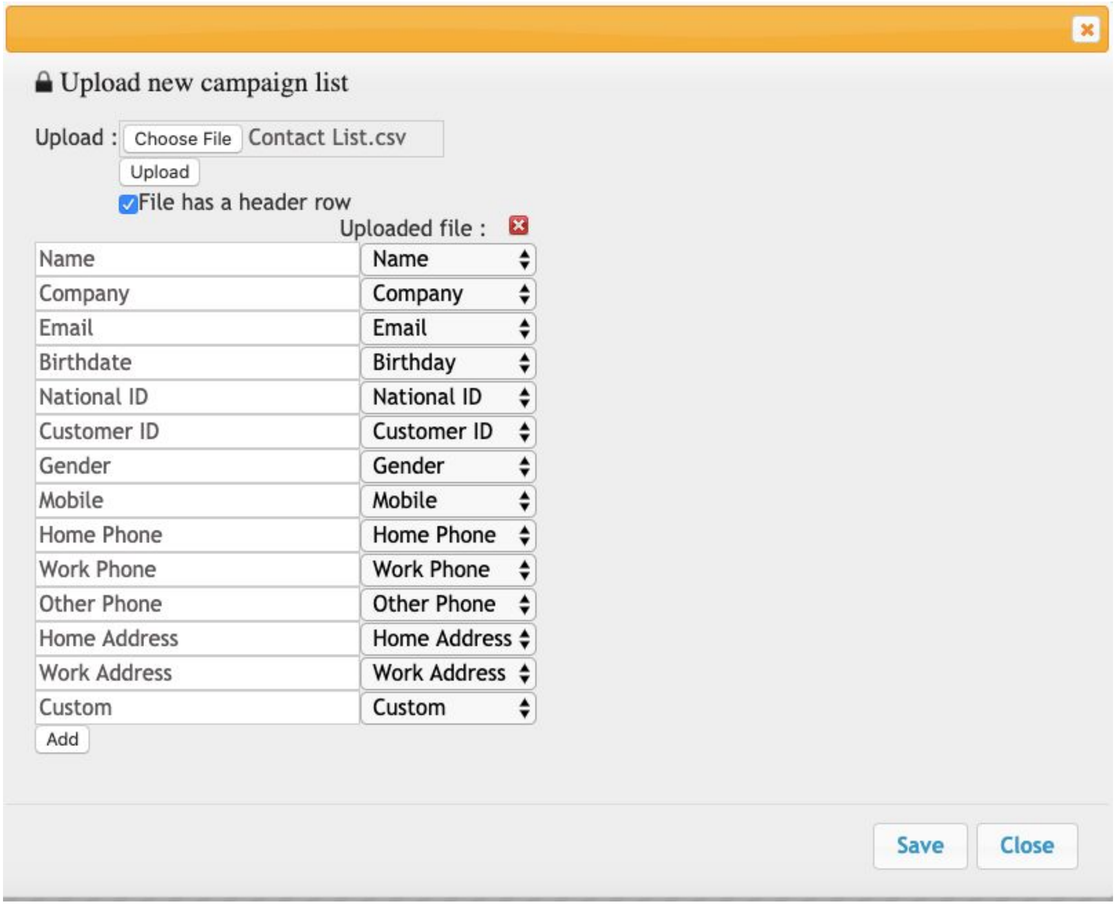


6. Click the Okay button, 

, to confirm the upload. Once the uploading process is done, the following screen will be seen as shown below.

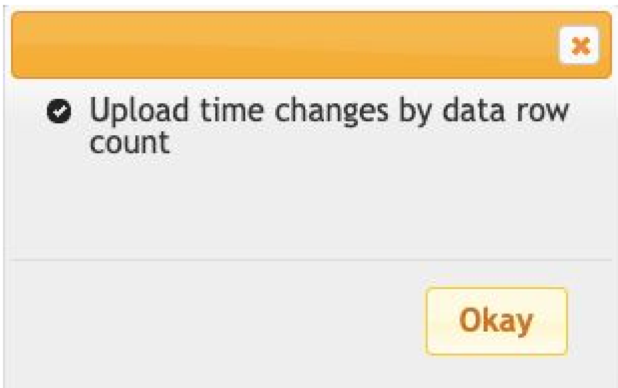


7. Choose the matched column names from the dropdown lists, as shown below.



8. Once the desired selection is made, click the add button, 

, the following pop-up window will appear as shown below:



9. Click the Okay button, 

, to confirm uploading. Then click the save button, 

.

10. Click the Close button, 

.

11. Click the refresh button, , to see added contact list.

Searching for a Contact

There are two ways to search for a Contact, as explained below:

Name

1. Click the "Name" input box, type the contact's name as shown below:

Note: Partial names can be used, when spelled correctly.

Company

1. Click the "Company" input box, type the contact's company name as shown below:

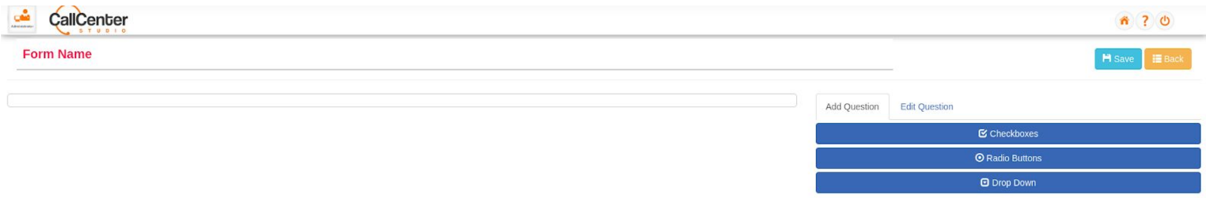
Note: Partial company names can be used, when spelled correctly.

Quality Evaluation Form

Quality Evaluation Forms can be prepared to allow managers the ability to assess past calls of agents. Evaluation forms can be formed as text, paragraph, option button, checkbox, list, and scale. Forms can be used or displayed by a supervisor or those with access.

Creating a Quality Evaluation Form

1. Click the Plus button, , in the top right-hand corner of the Quality Evaluation Form screen, the following screen will appear:



2. In the top left corner, click the "Form Name" input box, and type the name of the new Quality Evaluation Form, an example is shown below:

3. There are three views for question answers, click one of the following as described in the list below:

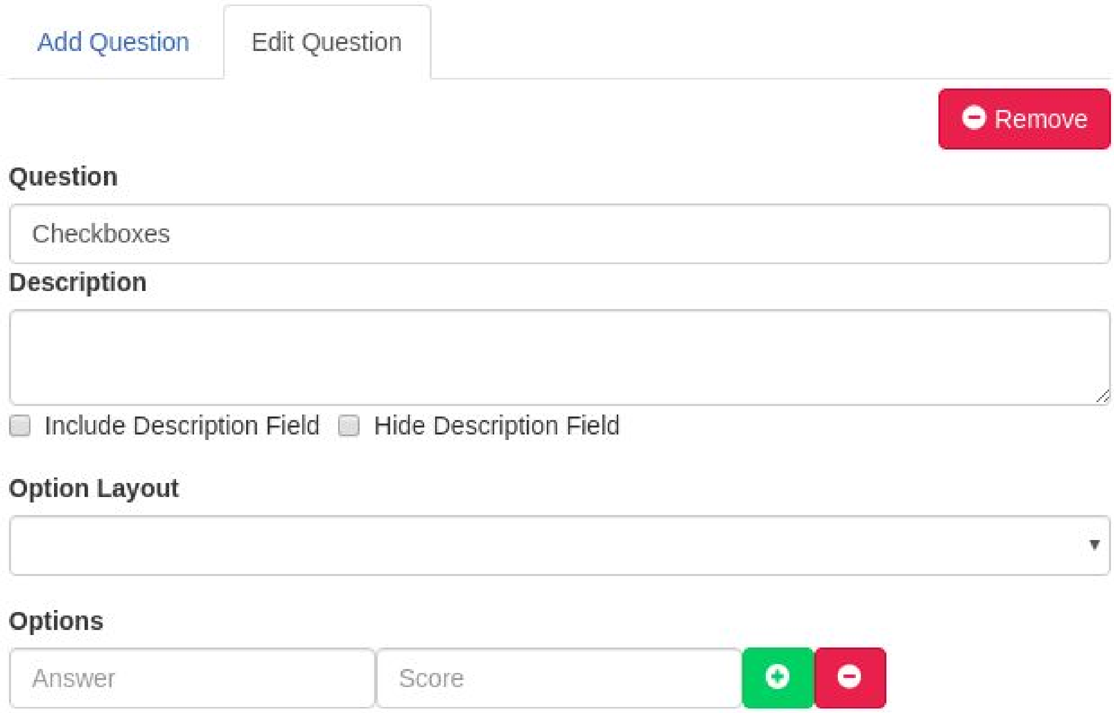
The question will be displayed in the checkbox format.

The question will be displayed in the radio button format.

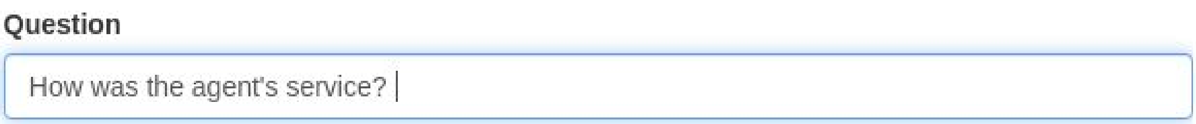
The question will be displayed in a dropdown format.

4. For this example, the “Checkboxes” selection was clicked; the following will appear on the screen, as shown below:

5. Customize the question, double-click the question desired to edit, the following screen will appear on the right of the screen as shown below:



6. Click the “Question” input box, type the name of the question. An example is shown below:

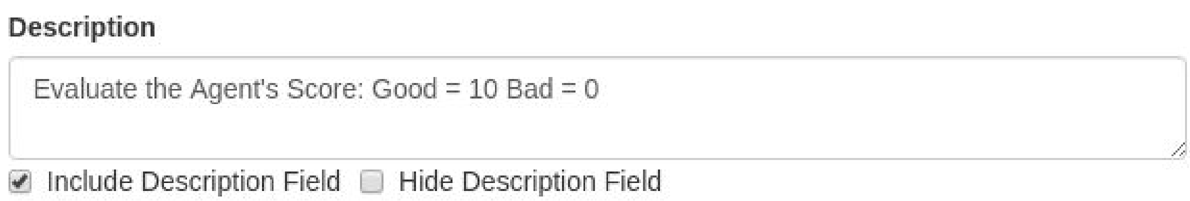


7. Click the “Description” input box; there are two selection boxes:

Check this box so that the evaluator can view the description.

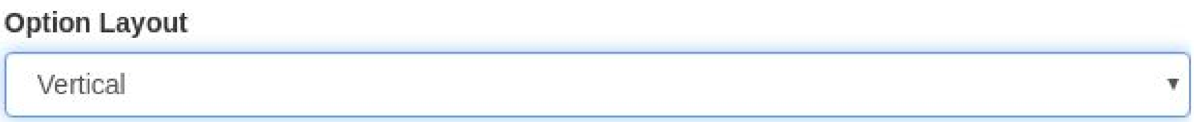
Check this box, used not to include the description (the evaluator will not be able to view the description if this box is checked)

For this example, the description will be included (Notice “Include Description Field” was clicked) as seen below:

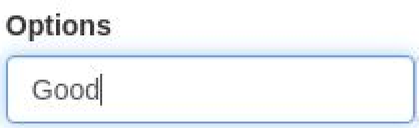


8. Click the “Option Layout,” a dropdown menu will appear showing two ways to view the answer options:

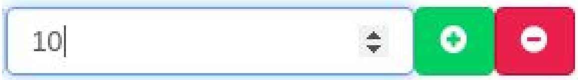
9. Click the desired view; an example selection is shown below:

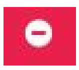


10. Under Options, in the "Answer" input box, type one answer as seen below:



11. To the right of the "Answer" input box, click the "Score" input box and assign point-scale to the questions as seen below:



12. Add more answers as necessary by clicking the Plus button, , and then repeat steps 10 - 11 (this can be done as often as needed). Also, answers can be deleted by clicking the Minus button, .

13. Add additional questions to the form by selecting the "Add Question" button, 

, and then repeat steps 3 - 12 as necessary.

Also, questions can be deleted by clicking the question, and then selecting the "Remove" button, 

.

14. After completing the form click the save button, 

, the following confirmation will be displayed in the top right-hand corner of the screen as shown below:

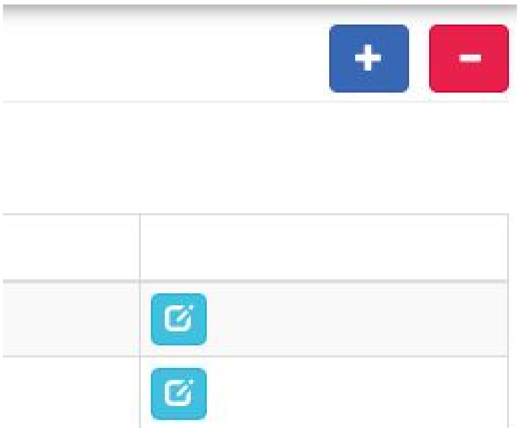
15. After saving the form, click the "Back" button, 

, the created form can now be seen from the Form Name list as shown below:

Deleting a Quality Evaluation Form

1. Select the checkbox to the left of the Form name, as shown below:

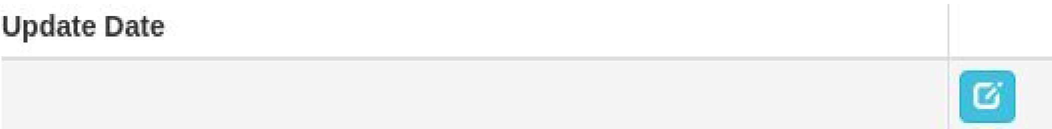
2. Press the Delete button, , located in the top right corner of the form name list screen as shown below:



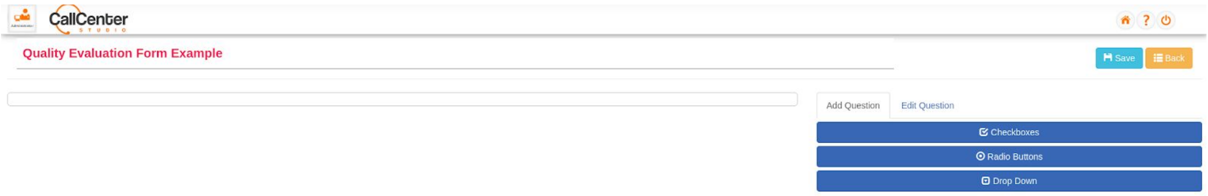
Note: after clicking the Delete button, the form will be deleted forever, no confirmation screen will be displayed.

Editing a Quality Evaluation Form

1. Select the Edit button, , located to the right of the update column as shown below:



After clicking the edit button, the following screen will appear:



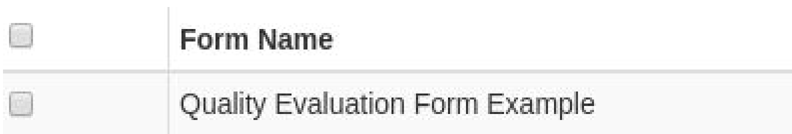
2. Make edits as necessary (Refer to the **Creating a Quality Evaluation Form** section for assistance)

3. After editing the form, click the save button, 

, the following confirmation will be displayed in the top right-hand corner of the screen, as shown below:

4. After saving the form, click the "Back" button, 

, the newly edited form can now be seen from the Form Name list as shown below:

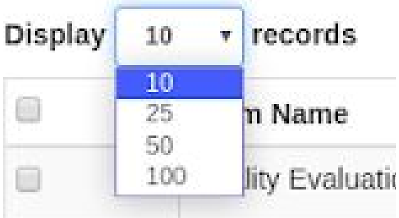


Searching for a Quality Evaluation Form

There are two ways to search for a Quality Evaluation Form, as explained below:

Manually

1. Click the “Display records” dropdown box the following will be displayed:



Note: up to 100 forms can be displayed on a single screen. If more than 100 are present, simply use the Previous button, Previous *, and/or Next button,* Next *. These buttons are located in the middle at the bottom of the Form Name list.*

Key Word Search

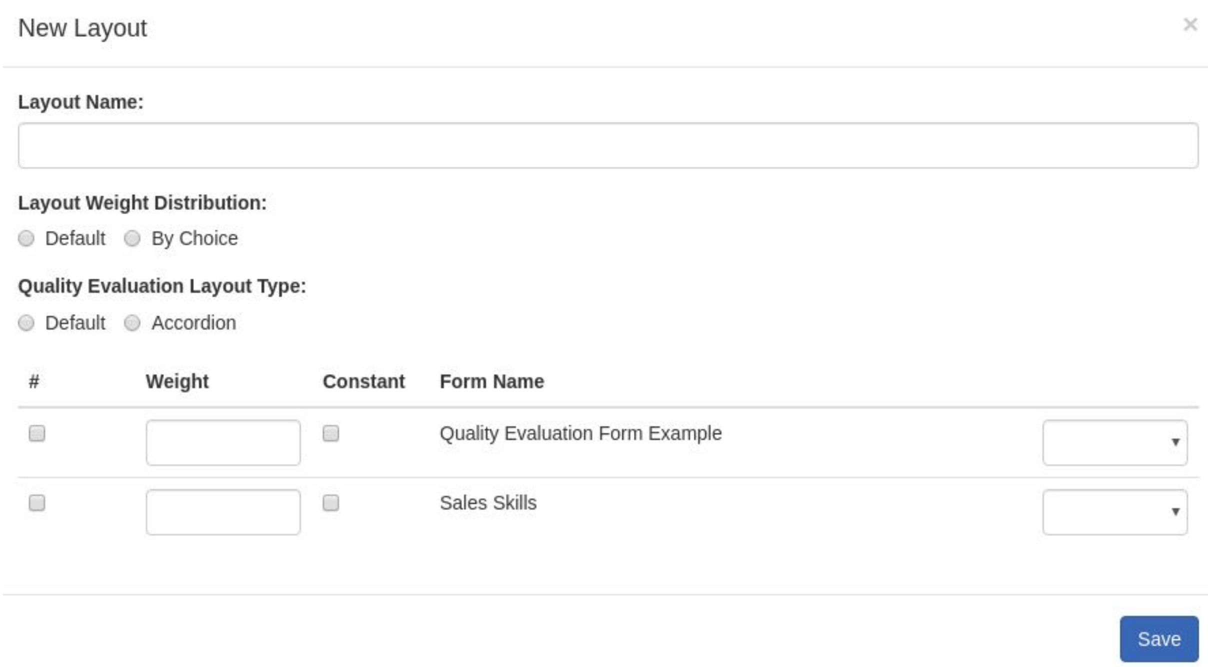
1. Click the “Search:” input box, type part of the form name, insert date, or update date to filter the form list.

Quality Evaluation Layout

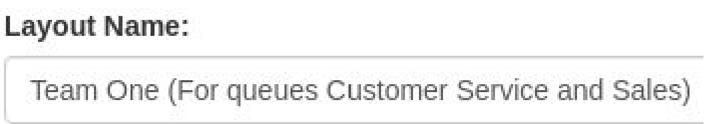
The Quality Evaluation Layout is used once a Quality Evaluation form has been created under the Quality Evaluation Form module (See ***Quality Evaluation Form*** *section for creating a Quality Evaluation Form). Using this section, form layouts can be designed, and weights can be given to forms as well. Also, form layouts can be made active or passive.*

Creating a Quality Evaluation Layout

1. Click the Plus button, , in the top right-hand corner of the Quality Evaluation Form screen, the following pop-up window will appear as shown below:



2. Click the “Layout Name” input box, type the desired layout name as shown below:



3. Under “Weight Layout Distribution” select from the following options explained below:

Default weight distribution: If using multiple forms, default weight distribution will assign 100 % weight to each form.

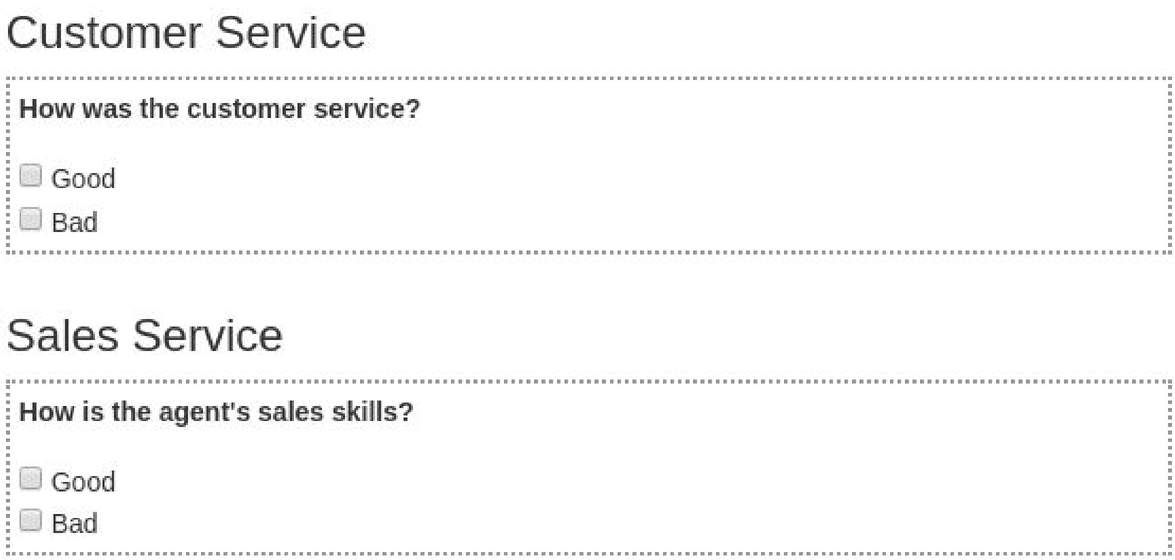
By Choice weight distribution: allows different weights to be assigned to each form. For example: Team One has two layouts: sales service and customer service. Agents from team one are assigned to both of these queues. Management determined the agent’s customer service score should have a higher value placed on it than the sales service score. To do this, the “By Choice” button will need to be selected. (Further directions on assigning specific weights is explained in detail in the following steps).

4. Under "Quality Evaluation Layout Type" select from the following options explained below:

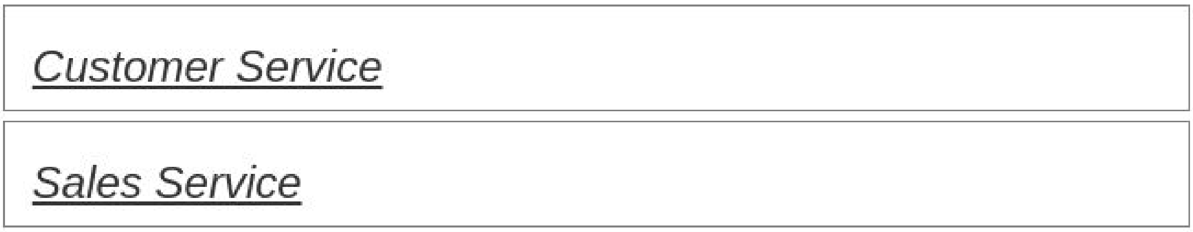
Default evaluation layout type: displays the default form layout under the Quality Control tab (Determines how the supervisor will see the forms).

Accordion evaluation layout type: displays the accordion form layout under the Quality Control tab (Determines how the supervisor will see the forms).

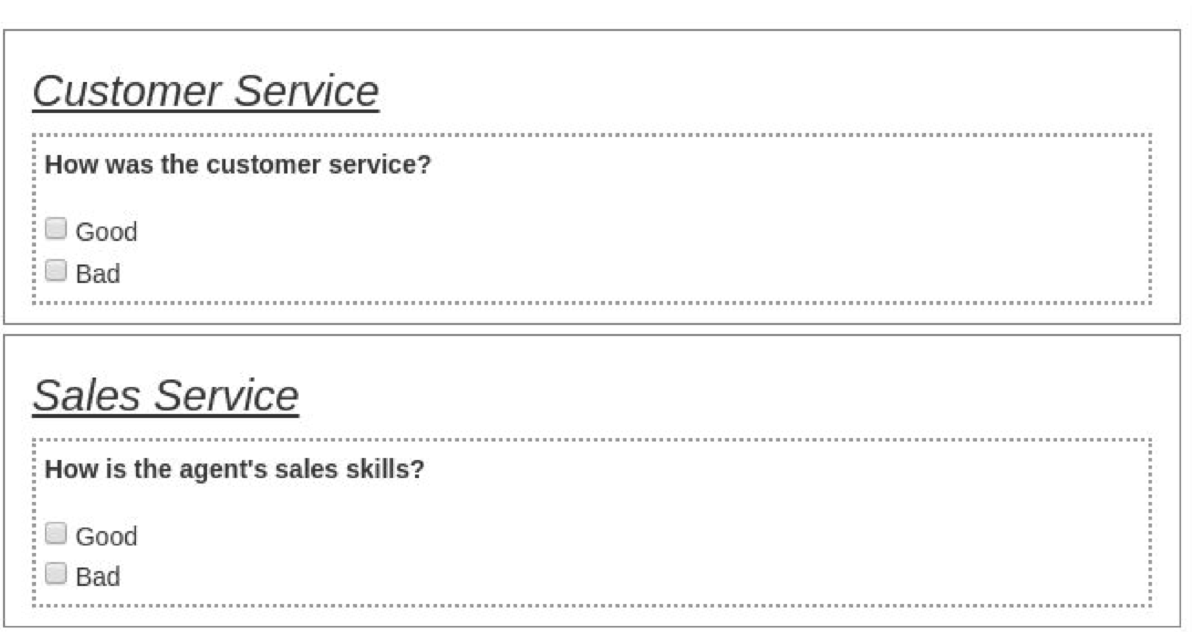
Default View (Under Quality Control Tab), seen while evaluating an agent:



Accordion View (Under Quality Control Tab), seen while evaluating an agent:

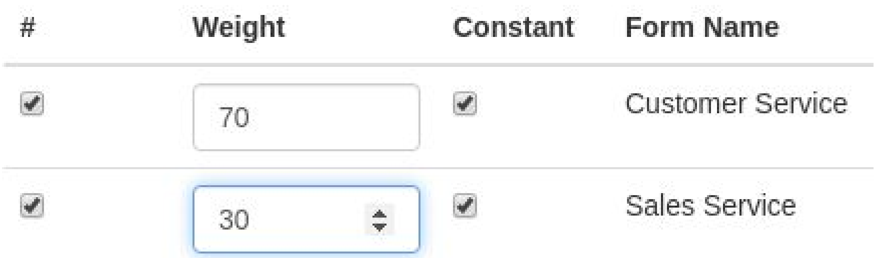


Accordion View after clicking each form (Under Quality Control Tab), seen while evaluating an agent:



5. Under the "#" there is a checkbox for each form. In this example we have created two forms, each form has a checkbox under the "#" (Click the checkbox if you want the form to be visible when the supervisor is in the Quality Control Tab) an image of the checkboxes is shown below:

6. Under "Weight," there is an input box for each form. In this example, we have created two forms: Customer Service and Sales Service. Management wants Customer Service to hold a higher weight in the agent evaluation than Sales Service to do this; we can assign a higher weight to the Customer Service form as demonstrated below:



#	Weight	Constant	Form Name
✔	70	✔	Customer Service
✔	30	✔	Sales Service

7. Under Constant, there is a checkbox for each form. The checkboxes, if selected, make the forms mandatory. In this example, since Team One may be using different queues, the Constant checkboxes have not been selected so that the supervisor can fill out the evaluation form that pertains to the specific call an example is shown below:

#	Weight	Constant	Form Name	
☑	70	☐	Customer Service	Customer Service ▾
☑	30	☐	Sales Service	Sales Service ▾

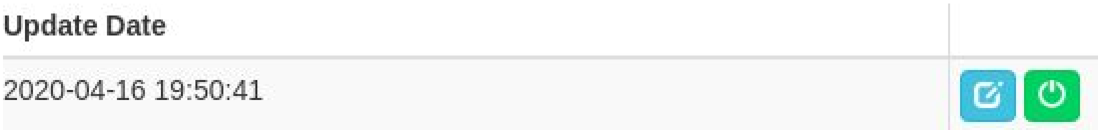
8. If using multiple forms, click the dropdown menu to the right of the form name match the form name with the corresponding dropdown selection as seen below:

Form Name	
Customer Service	Customer Service ▾
Sales Service	Sales Service ▾

9. Click the Save button, Save, the created form layout will be visible under the Form Name list shown below:

☐	Form Name
☐	Team One (For queues Customer Service and Sales)

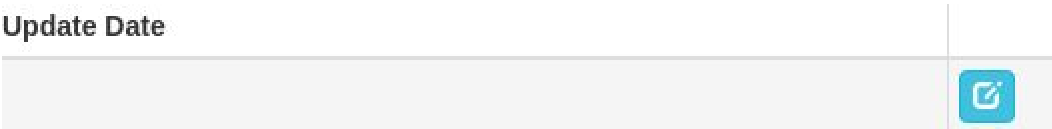
10. When a form is first saved, the status of the form by default is passive, meaning the supervisor under the quality control screen will not be able to see the form to evaluate the agent. Click the Passive button, , to the right of "Update Date." The Passive button will change to the Active Button, , as shown below:



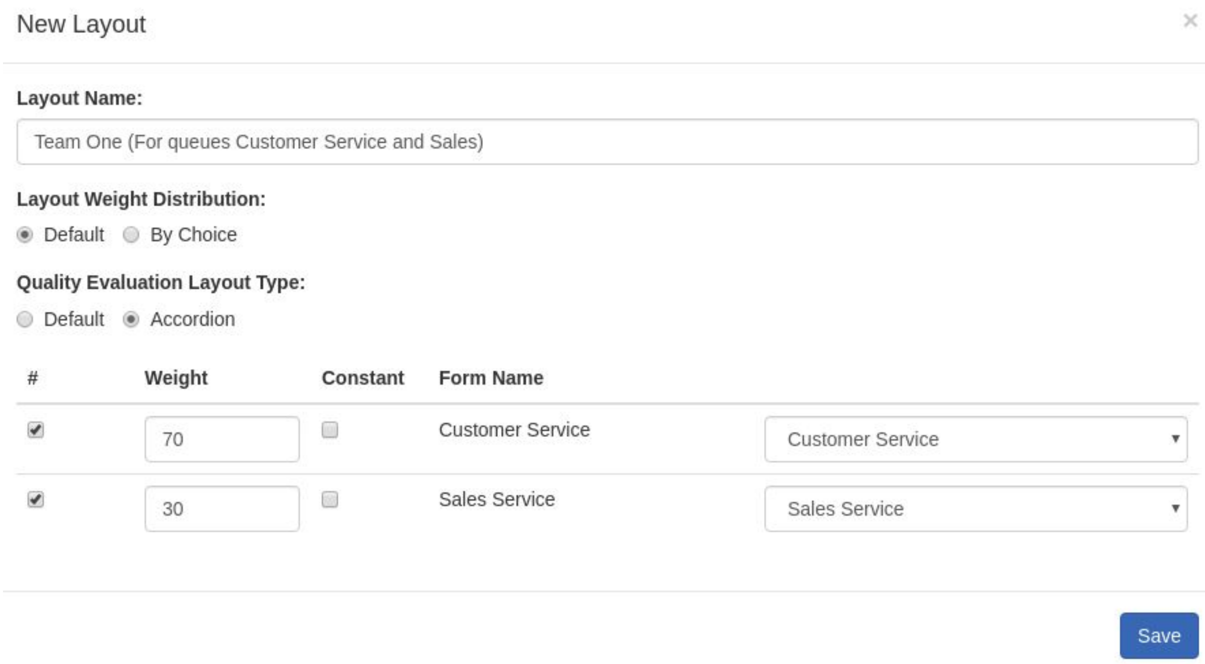
The form layout is set, and the supervisor can begin to review agents.

Editing a Quality Evaluation Form

1. Select the Edit button, , located to the right of the update column as seen below:

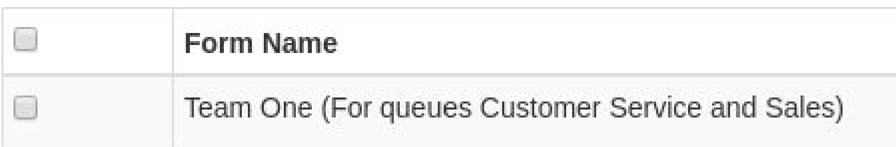


After clicking the edit button, the following pop-up window will appear:

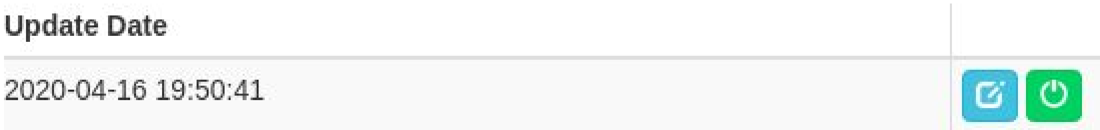


2. Make edits as necessary (Refer to the **Creating a Quality Evaluation Layout** section for assistance)

3. Click the Save button, , the created form layout will be visible under the Form Name list shown below:



4. Click the Passive button, , to the right of "Update Date." The Passive button will change to the Active Button, , as shown below:

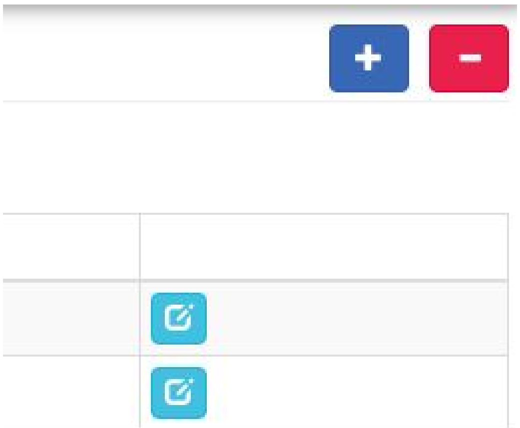


The edited form layout is set, and the supervisor can begin to review agents.

Deleting a Quality Evaluation Layout

1. Select the checkbox to the left of the form's name, as shown below:

2. Press the Delete button, , located in the top right corner of the form name list screen as shown below:



Note: after clicking the Delete button, the form layout will be deleted forever, no confirmation screen will be displayed.

Searching for a Quality Evaluation Layout

There are two ways to search for a Quality Evaluation Form, as explained below:

Manually

1. Click the “Display records” dropdown box the following will be displayed:

Note: up to 100 forms can be displayed on a single screen. If more than 100 are present, simply use the Previous button, Previous *, and/or Next button,* Next *. These buttons are located in the middle at the bottom of the Form Name list.*

Key Word Search

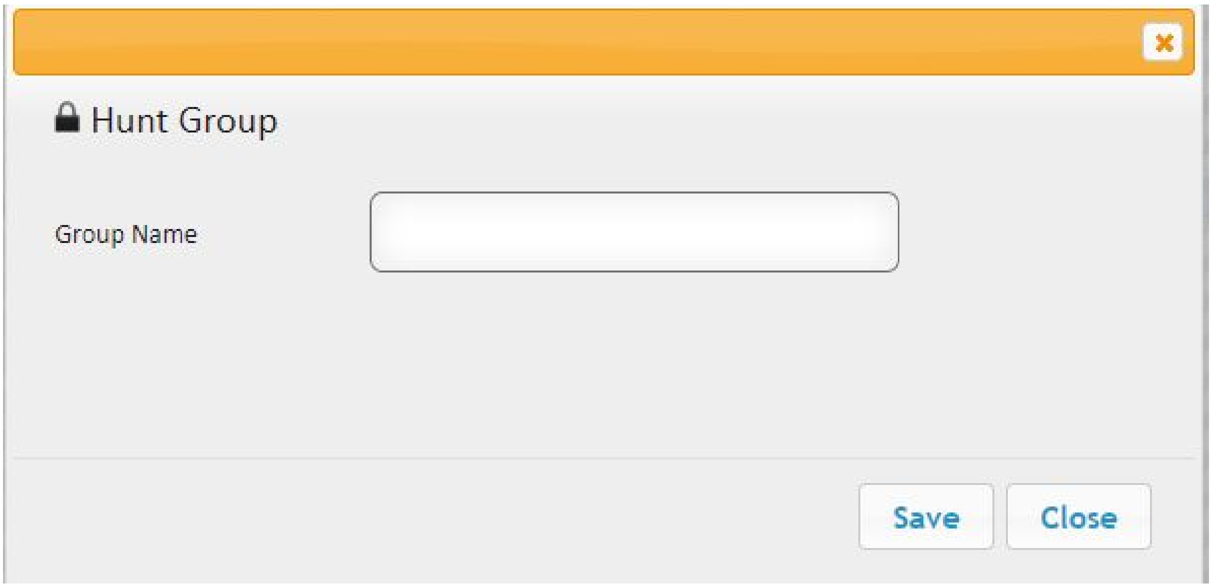
1. Click the “Search:” input box, type part of the form layout name, insert date, or update date to filter the form list automatically.

Hunt Groups

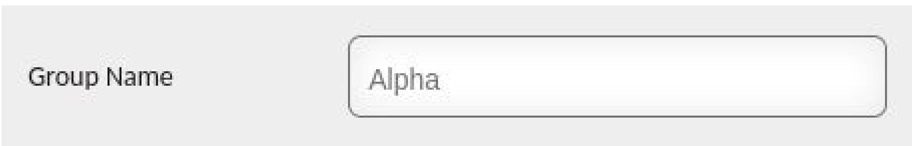
A hunt group is a feature for the IP phone system that distributes calls from a single phone number to a group of numbers in the company. The hunt group is used in such a way that when a customer calls the company's number, the hunt group will connect the call to a group of numbers.

Creating a Hunt Group

1. Press the new button, , the pop-up window will appear as shown below:

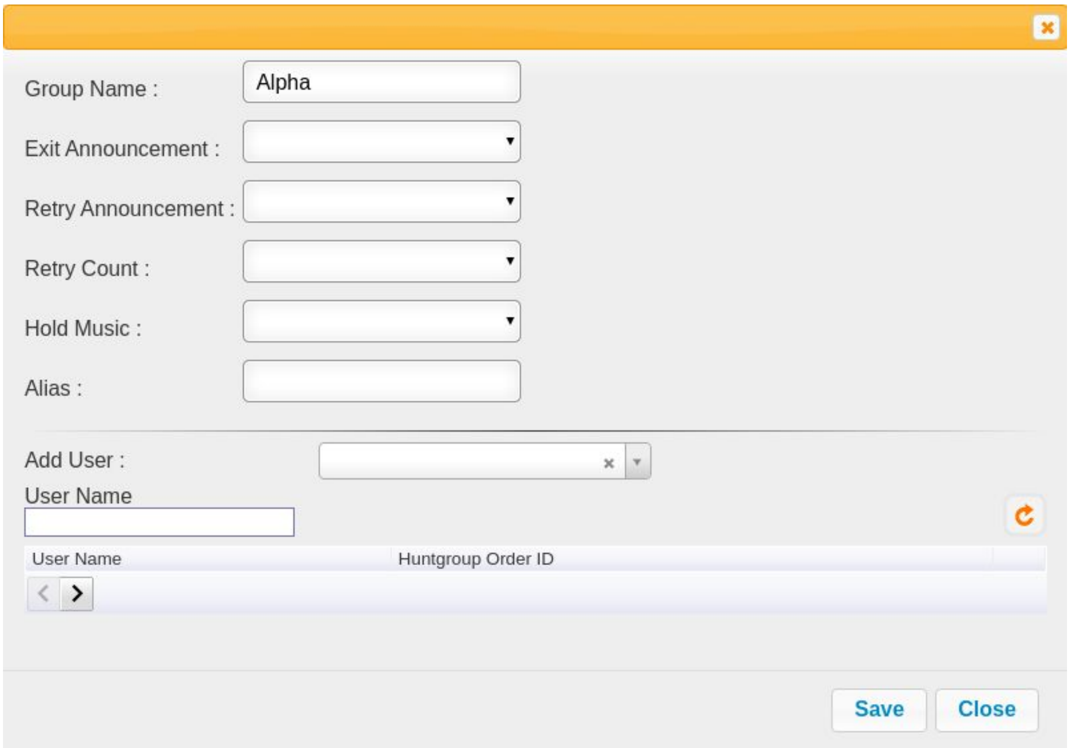


2. Click the group name input box, type the desired Hunt group name, an example is shown below:

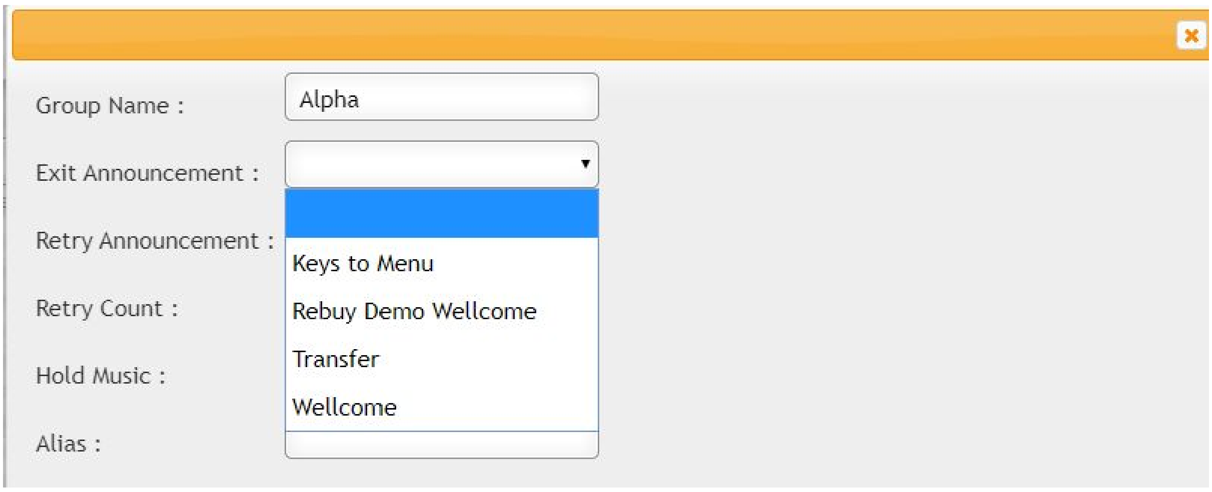


Note: the hunt group name can be edited at any time.

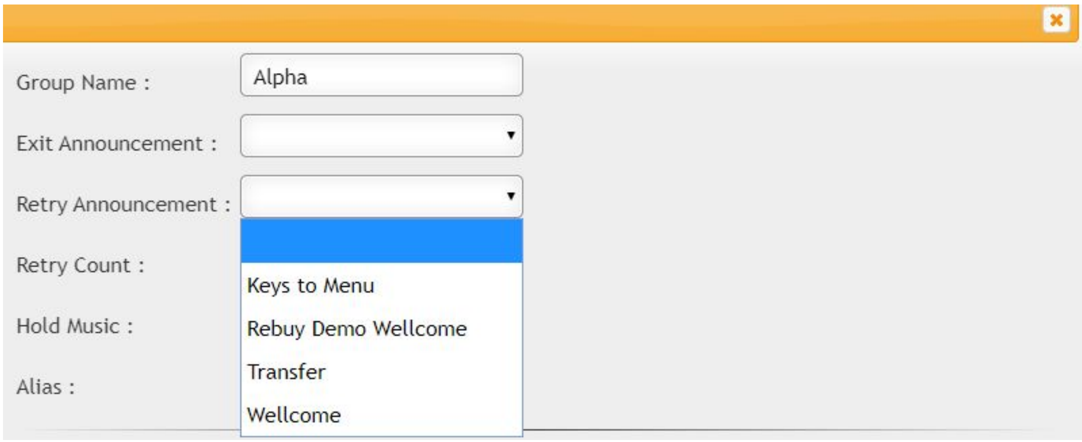
3. Click the save button, Save , the following pop-up window will appear:



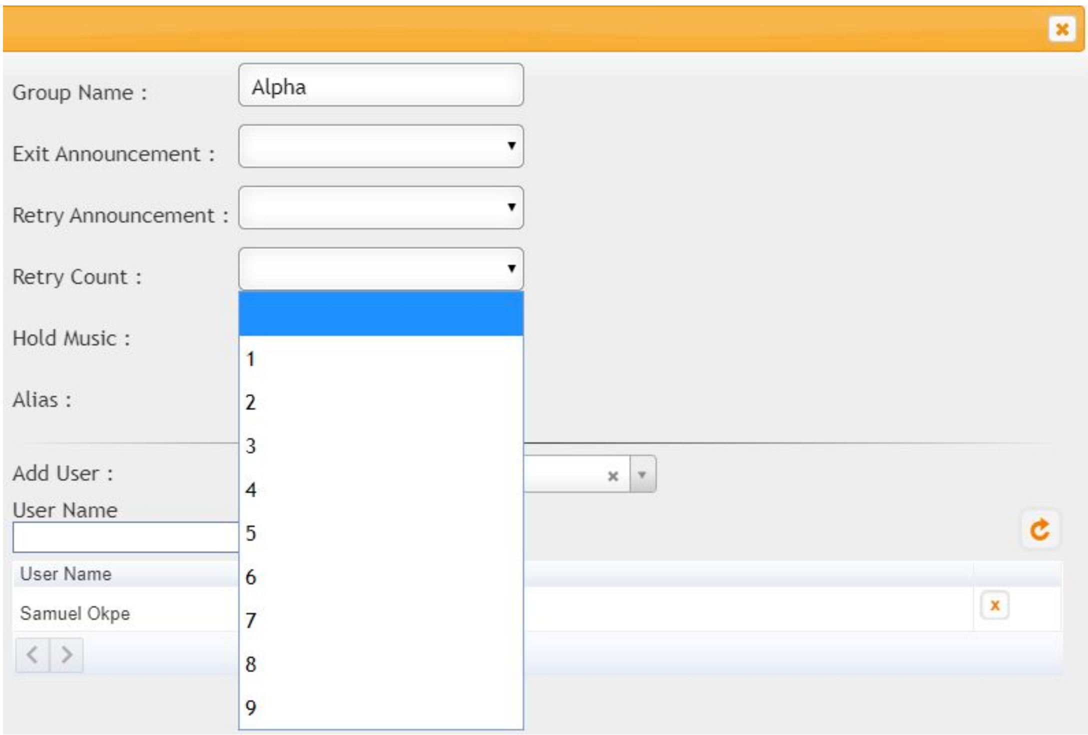
4. Click the announcement input box a dropdown list will appear with created announcements, select the desired announcement (See the Announcement Section for creating a new announcement)



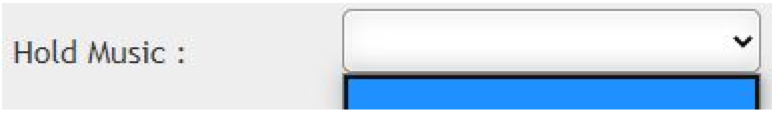
5. Click the retry announcement input box a dropdown list will appear with created announcements, select the desired announcement (See the Announcement Section for creating a new announcement)



6. Retry Count: This is the maximum number of attempts it takes to reconnect the caller to the hunt group. It ranges from 1-9 as shown below:



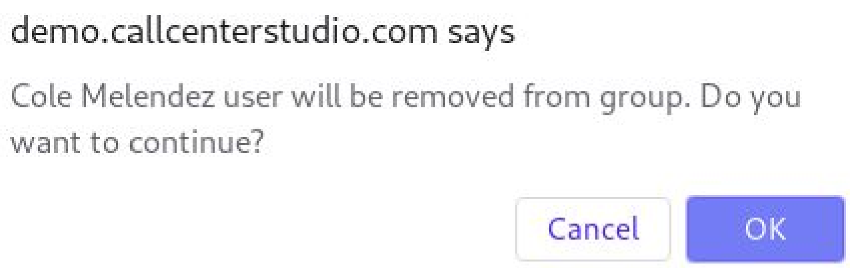
7. Select “Hold Music” if desired: This feature keeps the caller occupied while in the queue. (Hold music can be added upon request to the Call Center Studio Team, the sound file must be 16bit mono 8000hz .wav format).



8. In the “Alias” input box type an alias if desired. (Hunt groups are sets of endpoints that share an alias or aliases. Alias makes it possible for registered endpoints to join or leave the hunt group.)

9. Add User: Users are added to the hunt group by pressing the  button on the add user column. The user name search button makes it easy for users to be found. Similarly, the hunt group order ID for users can be changed by using the downward and upward facing arrows.

Note: A user can be removed from the hunt group by clicking on the delete button, x*, located to the far right of the User's name.*

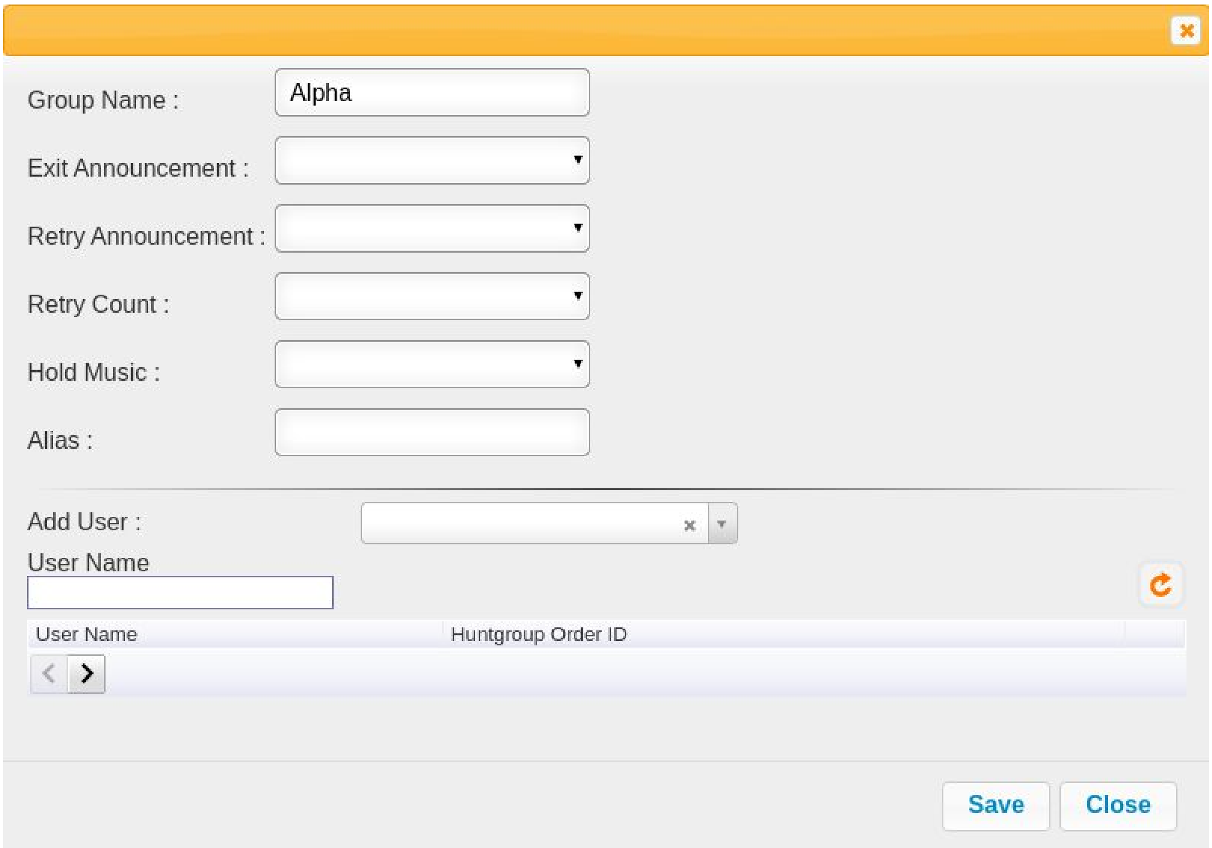


- *Selecting the cancel button,* Cancel *, will cancel the deletion.*
- *Selecting the OK button,* OK*, will confirm the deletion.*

10. Click the save button, Save .

Editing a Hunt Group

1. To edit a hunt group, click the edit button, , located on the far right after the "Update Date" column. The following pop-up window will appear:

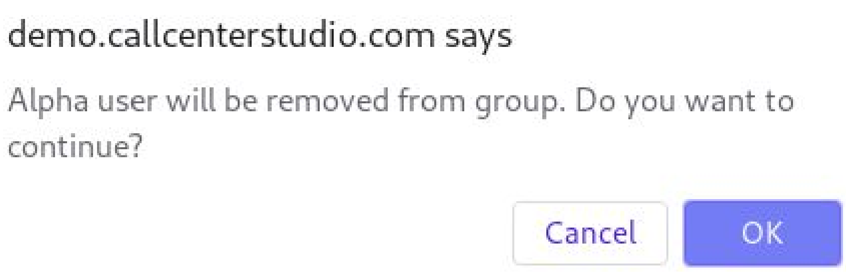


2. Make necessary changes

3. Click the save button, Save .

Deleting a Hunt Group

1. Click the delete button, , located to the right of the edit button, . The following pop-up window will appear:



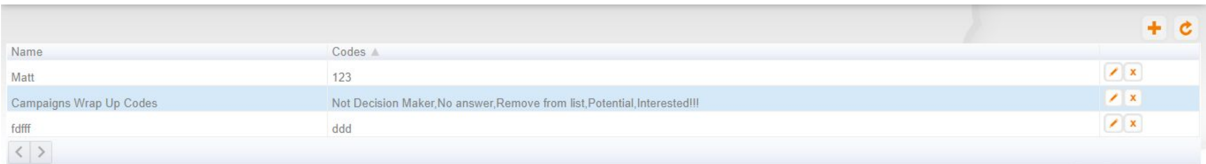
- *Selecting the cancel button,* Cancel *, will cancel the deletion.*
- *Selecting the OK button,* OK*, will confirm the deletion.*

2. Confirm the deletion by clicking the OK button, OK.

The screen will reload and the deleted hunt group will not be shown.

Wrapup Codes

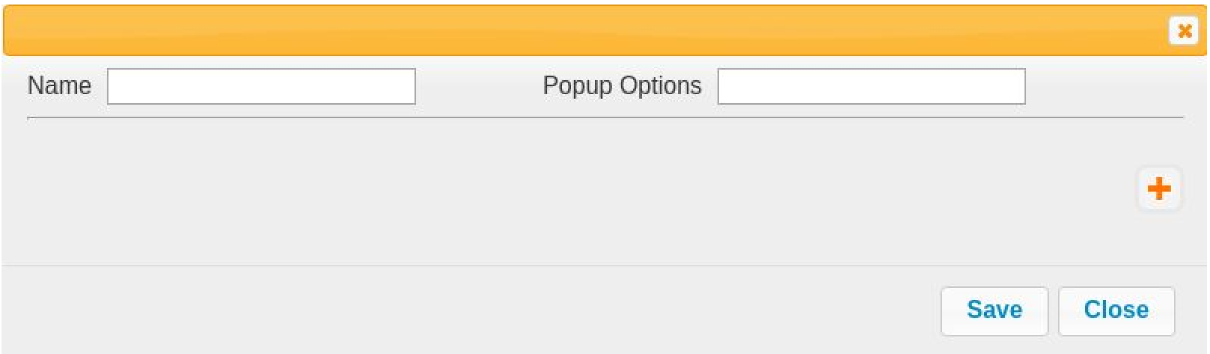
Wrapup codes are a quick way to summarise important information in an interaction.



This step is used to designate topics covered on agent calls. These codes can be used to quickly access reports. Calls logs can be accessed according to closing code results and reports can be taken. *Note: Wrapup codes are used only for outgoing calls not part of a campaign.*

Creating a Wrapup Code

1. Click the new button, the following pop-up window will appear:

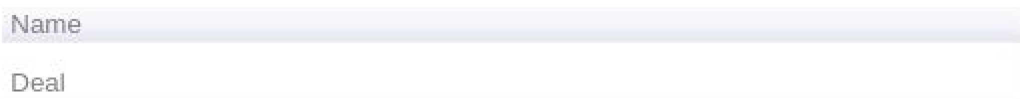


2. Click the Name input box, type the desired wrapup code an example is shown below:

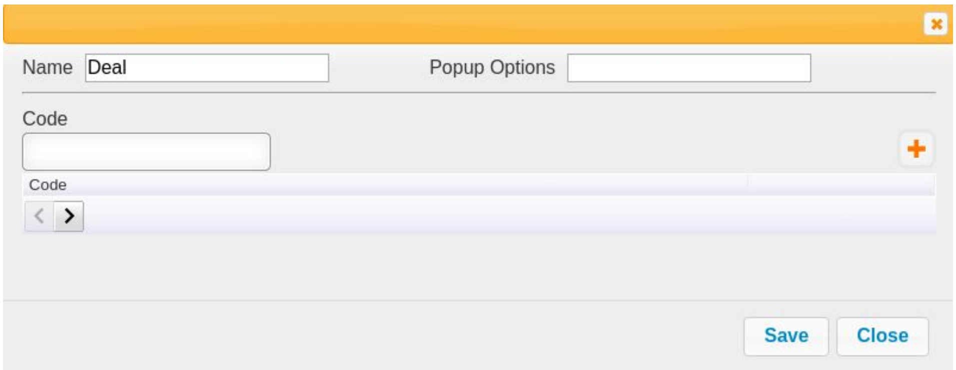
3. Click the Popup Options input box, (this section is used to change the size of the Wrapup code pop-up option window) input the following formula and customize as desired:

width=1500,height=1000,screenX=0,left=0,screenY=0,top=0

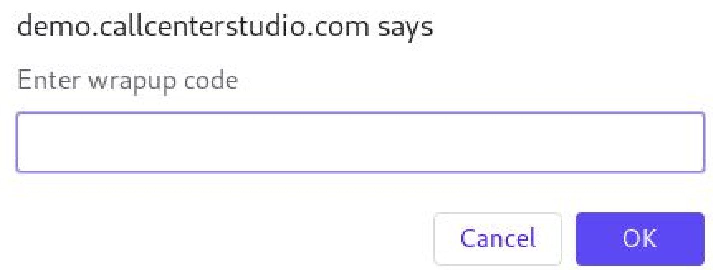
4. Click the save button, Save. The new wrapup code will be displayed in the wrapup code list as shown below:



5. Wrapup codes can be accessed using the edit button. Click the edit button of the desired Wrapup code group name. The screen is shown below:

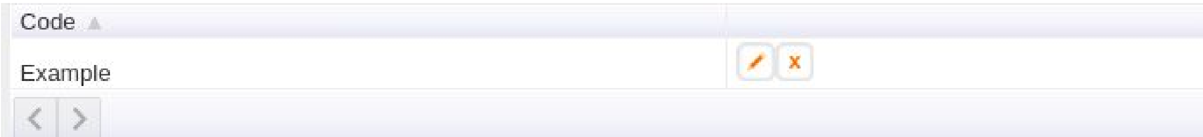


6. To add a wrapup code, click the "Add" button, , the following pop-up window will appear:



7. In the "Enter wrapup code" input box, type the desired wrapup code name.

8. Click the "OK" button, OK . An example wrapup code is shown below:



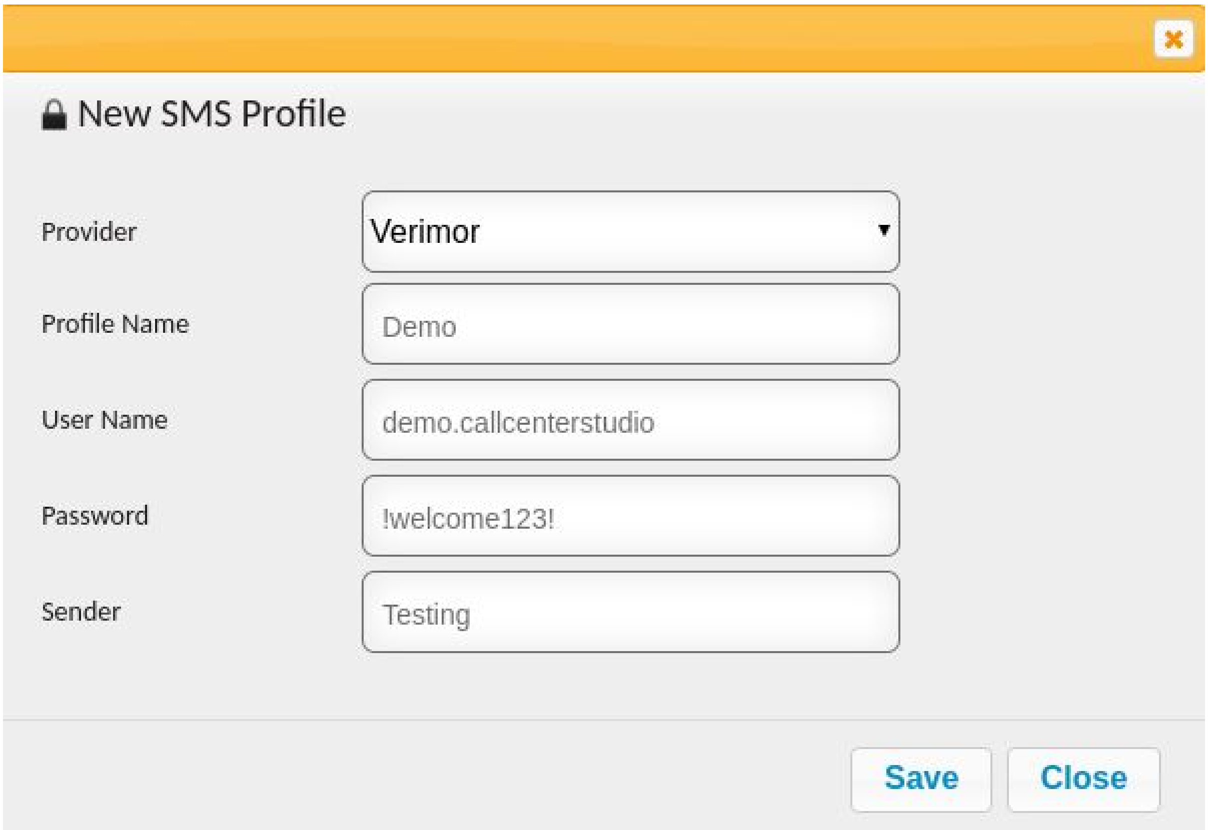
- Use *the edit button,* , to the right of the desired wrapup code to modify the code's name.
- Use the delete button, , to delete the wrapup code. The following pop-up window will be displayed:

- *Selecting the cancel button,* Cancel *, will cancel the deletion.*
- *Selecting the OK button,* OK *, will confirm the deletion.*

9. Multiple wrapup codes can be created under one wrapup group name. For example: Lead, Denied, No answer, are sample wrapup codes that could be in the same wrapup code group. To create multiple wrapup codes, repeat steps 6-8.
10. Click the save button, Save .

Editing a Wrapup Code

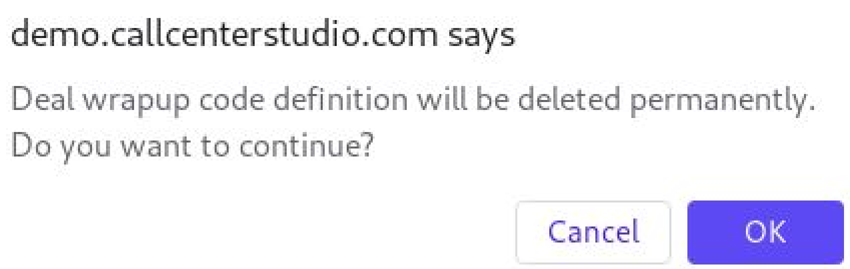
1. Click the edit button on the far right of the column of the desired wrapup code group name. The following pop-up window will appear:



2. Make the necessary changes
3. Click the save button, Save .

<u>Deleting a Wrapup Code</u>

1. Click the delete button, , located to the right of the edit button, . The following pop-up window will appear:

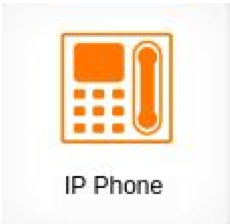


- *Selecting the cancel button,* Cancel *, will cancel the deletion.*
- *Selecting the OK button,* OK *, will confirm the deletion.*

2. Confirm the deletion by clicking the OK button, OK .

The screen will reload and the deleted wrapup code will not be shown.

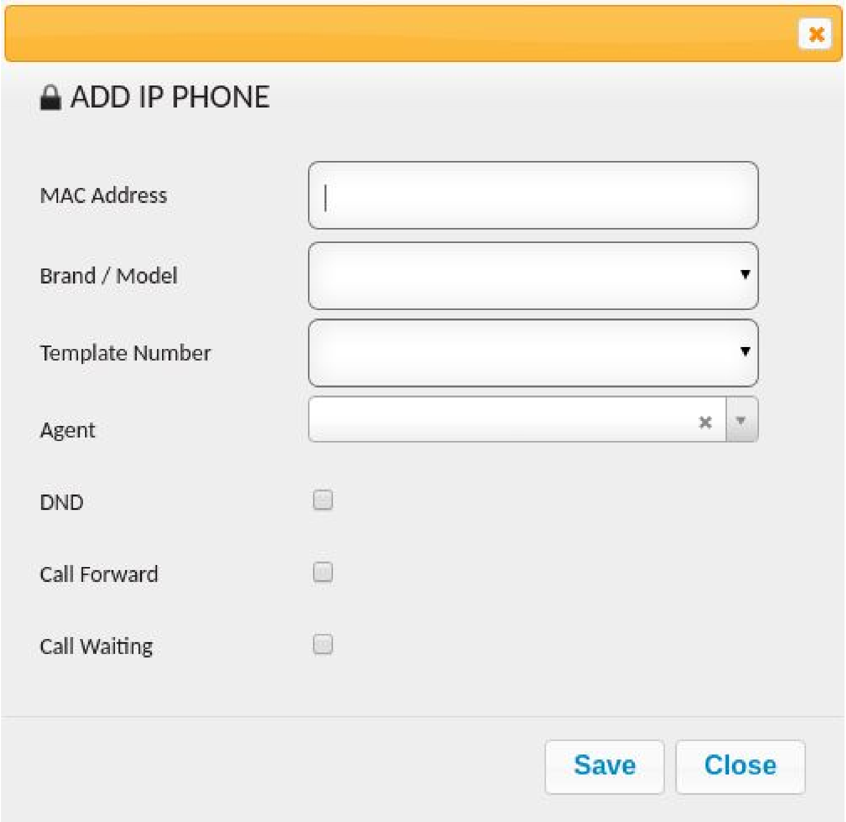
IP Phone



The IP phone tab is used to set up IP phones for agents to use in coordination with Call Center Studio's software.

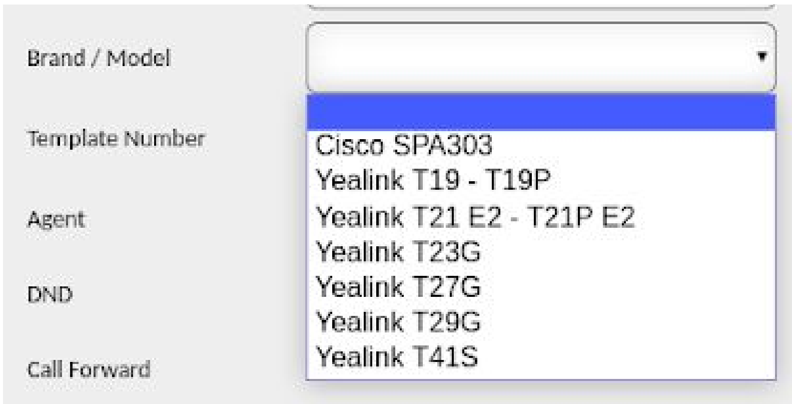
Adding an IP Phone

1. Click the new button, ✚, in the top right corner the following pop-up screen will appear as shown below:

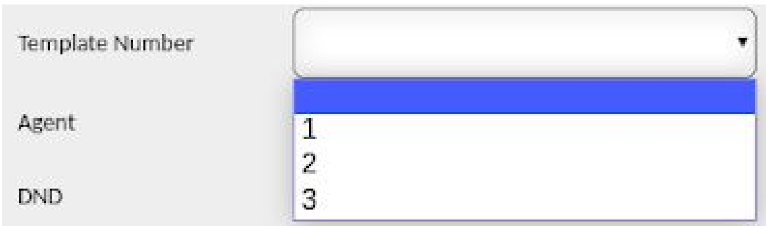


2. In the “MAC Address” input box, type the MAC address of the desired IP Phone. (Normally a 12 digit alphanumeric string located on the bottom of the IP phone or in the settings on the phone.)

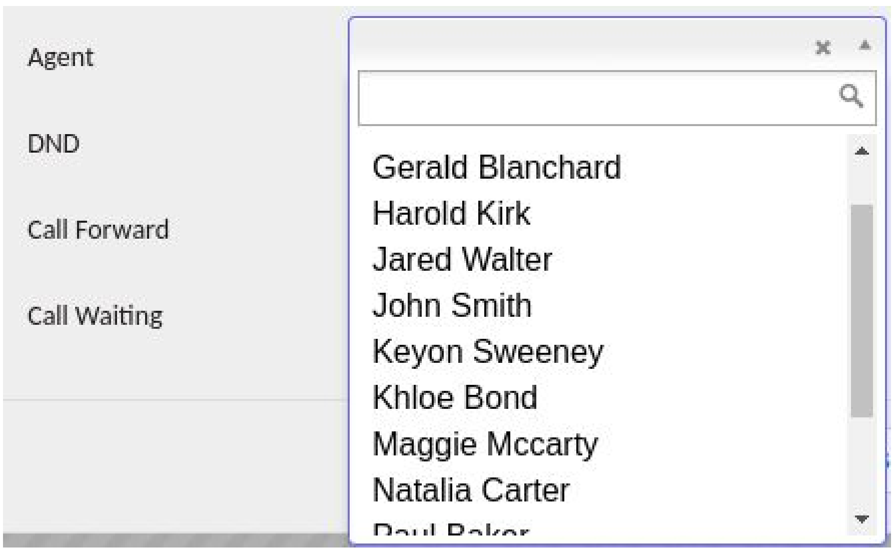
3. Click the “Brand / Model” dropdown box, the following brands and models are currently compatible with Call Center Studio’s software:



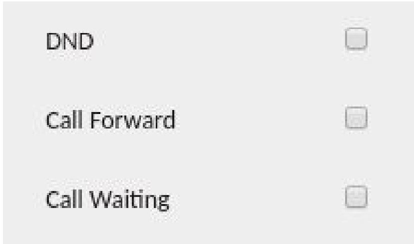
4. Click the “Template Number” dropdown box, chose from the following template numbers:



5. Click the “Agent” dropdown box, select the desired agent for the IP phone. An example is shown below:



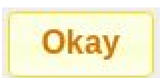
6. Below the “Agent” dropdown box, the following checkboxes are shown:



DND	When checked, the “Do Not Disturb” feature can be used on the IP phone.
Call Forward	When checked, the “Call Forward” feature can be used on the IP phone.
Call Waiting	When checked, the “Call Waiting” feature can be used on the IP phone.

7. Click the save button, 

. The following pop-up window will appear:

8. Click the okay button, 

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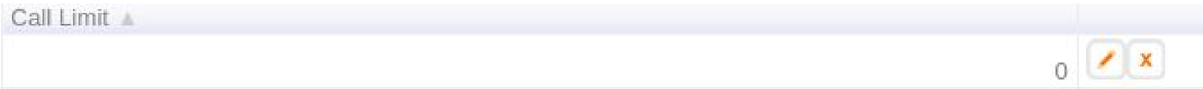
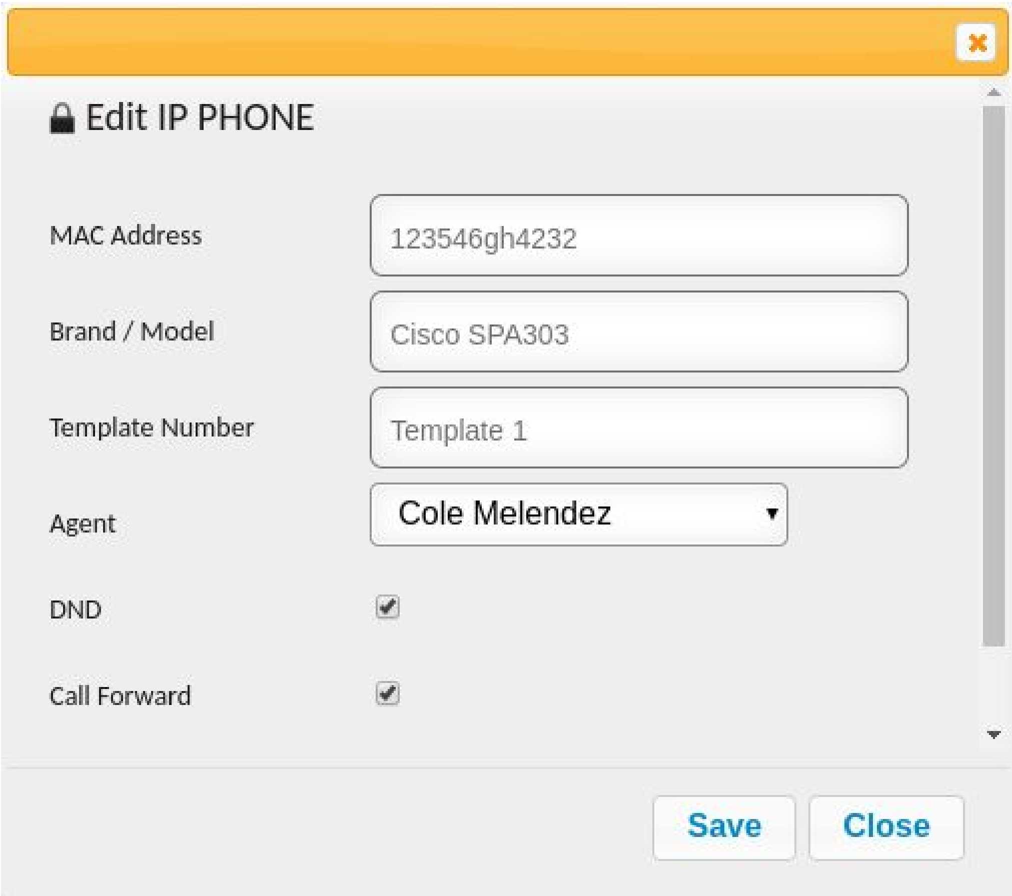
Editing an IP Phone

1. To edit an IP Phone, click the edit button, , located on the far right of the IP MAC address after the "Template Number" column as shown below:



After clicking the edit button, the IP Phone window will appear as shown:

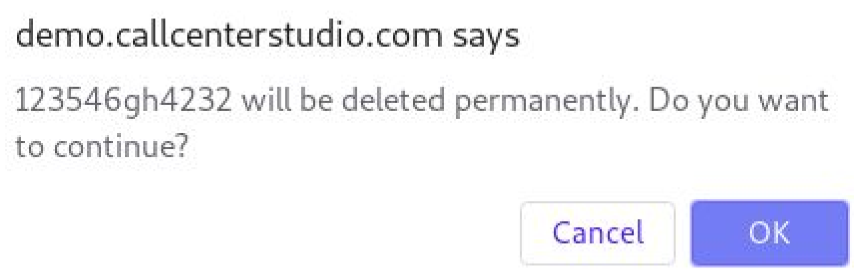


2. Make changes as desired.

Deleting an IP Phone

1. From the IP Phone list, click the delete button, , to the right of the edit button, .

   When the delete button is clicked the following pop-up will appear:



- *Select the cancel button,* Cancel *, to cancel the deletion.*
- *Select the OK button,* OK *, to confirm the deletion.*

2. Confirm the deletion by clicking the OK button, OK.

The screen will reload, and the deleted IP Phone will not be shown.

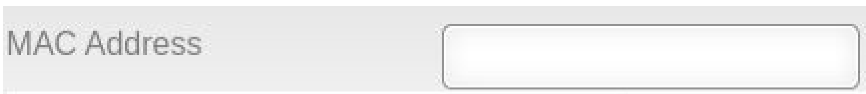
Searching for an IP Phone

There are three ways to search for an IP Phone.

- MAC Address
- Brand / Model
- User

MAC Address

1. Click the "MAC Address" input box, type the MAC Address, the input box is shown below:



Note: Partial names can be used, when spelled correctly.

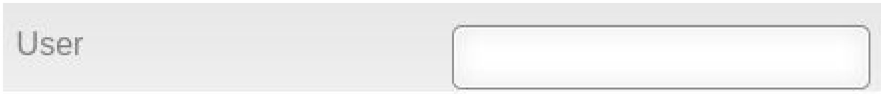
Brand / Model

1. Click the "Brand / Model" input box, type the Brand / Model, the input box is shown below:

Note: Partial names can be used, when spelled correctly.

User

1. Click the "User" input box, type the user's name, the input box is shown below:



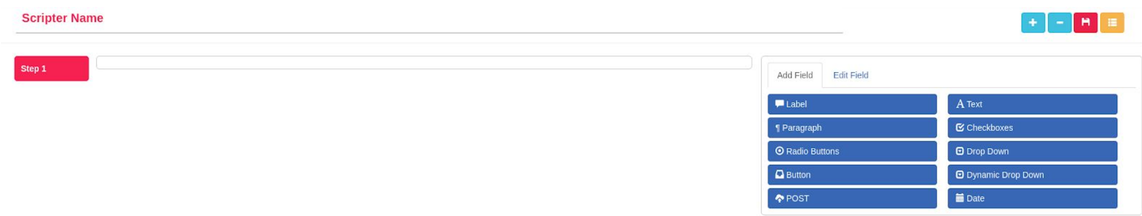
Note: Partial names can be used, when spelled correctly.

Scripter

Used to create, edit, and execute agent outbound scripts.

Adding a Scripter

1. Click the Plus button, , in the top right-hand corner of the Scripter screen, the following pop-up window will appear:



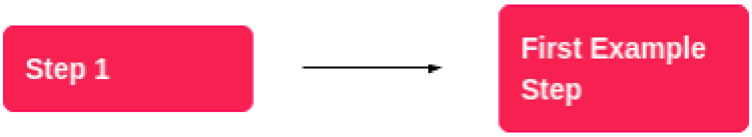
2. Click the “Scripter Name” input box (in red) and type the desired script name; an example is shown below:

3. Click the “Step 1” button, 

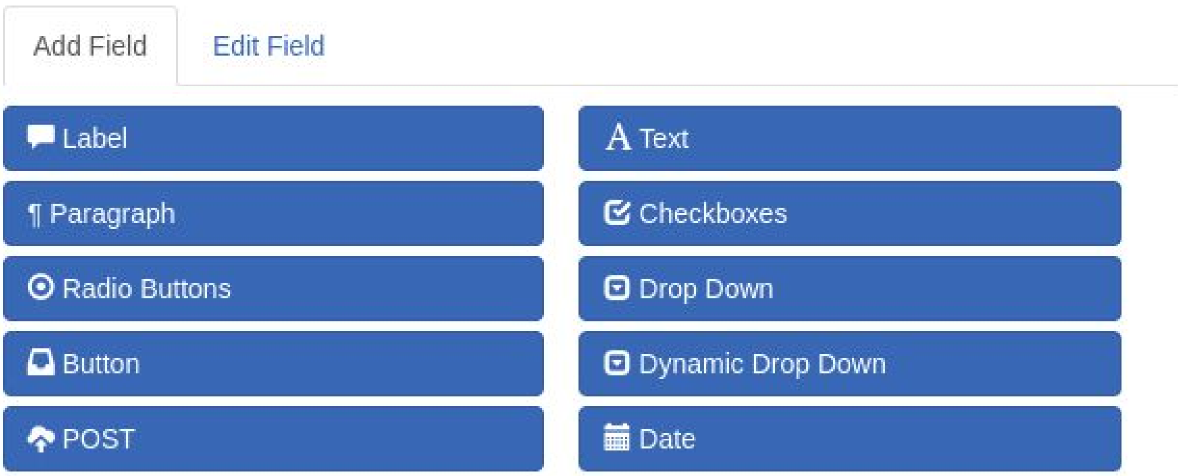
, the following window will appear on the right-hand side of the screen:

4. Click the “Label” input box, type the desired name for step 1, an example is shown below:

Note the following transition will also occur on the left-hand side of the Scripter screen:



5. After the desired step name is assigned, click “Add Field,”  . The following window will appear:



Adding label Field

1. Click the "Label" button, 

, the following items will appear on the screen:

2. Double click the "Label" window once clicked it will become shaded as shown below:

Also, the "Edit Field" for the Label step will appear on the right-hand side of the screen, as shown below:

3. Click the "Label" input box, type as desired.

4. Check as desired, the checkboxes located below the “Label” input box, as shown below:

The following checkboxes are described below:

Required	Marks the following field as required.
Show Summary	"Viewing a Scripter" section shows an example.
Show in Report	Shows the field in the report.

Note: when the checkboxes are selected, they can be seen in red under the field details as shown below:

5. Click the save button,  .

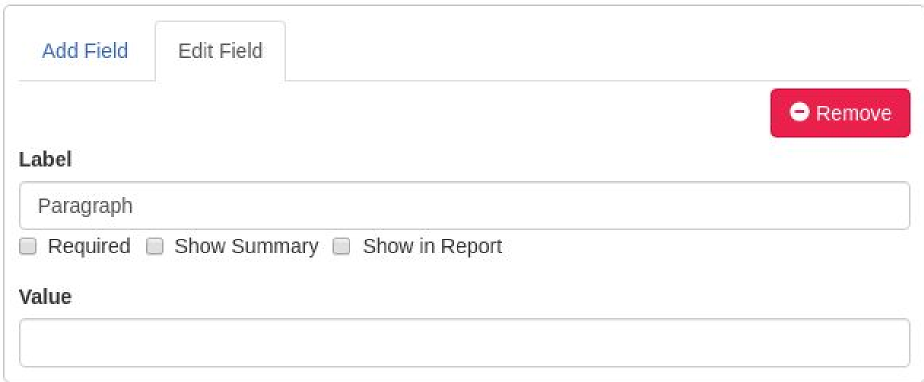
Adding Paragraph Field

1. Click the “Paragraph” button, 

, the following items will appear on the screen:

2. Double click the “Paragraph” window once clicked it will become shaded as shown below:

Also, the “Edit Field” for the Label step will appear on the right-hand side of the screen, as shown below:



3. Click the “Label” input box, type as desired.

4. Check as desired, the checkboxes located below the “Label” input box, as shown below:

The following checkboxes are described below:

Required	Marks the following field as required.
Show Summary	"Viewing a Scripter" section shows an example.
Show in Report	Shows the field in the report.

Note: when the checkboxes are selected, they can be seen in red under the field details as shown below:

5. Click the “Value” input box, type as desired.

6. Click the save button,  .

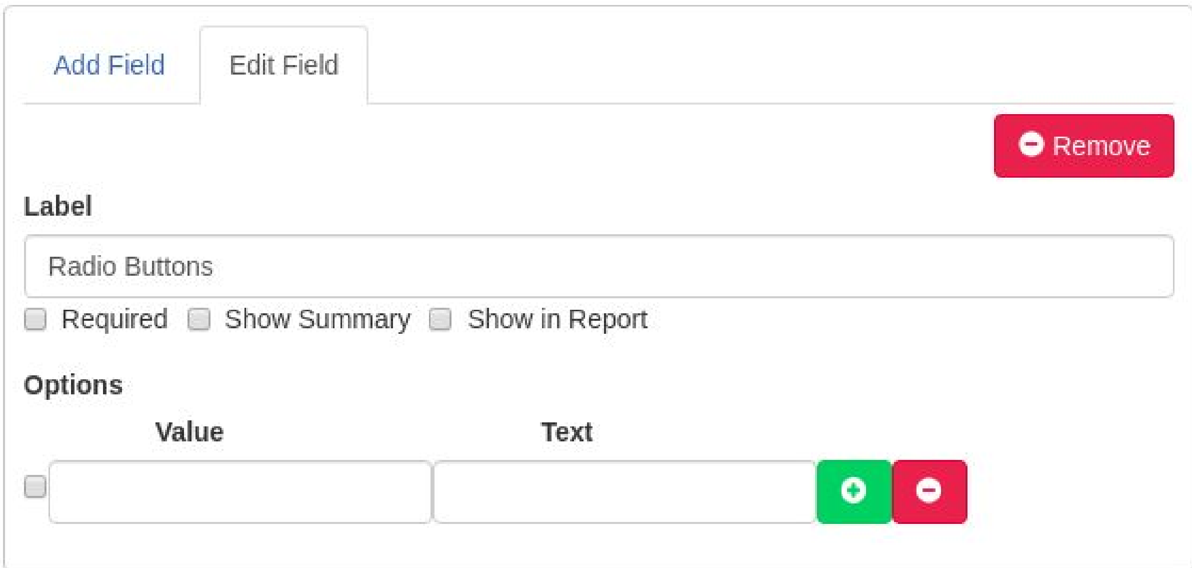
Adding Radio Buttons Field

1. Click the "Radio Buttons" button, 

, the following items will appear on the screen:

2. Double click the "Radio Buttons" window once clicked it will become shaded as shown below:

Also, the "Edit Field" for the Label step will appear on the right-hand side of the screen, as shown below:



3. Click the "Label" input box, type as desired.

4. Check as desired, the checkboxes located below the "Label" input box, as shown below:

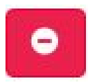
The following checkboxes are described below:

Required	Marks the following field as required.
Show Summary	"Viewing a Scripter" section shows an example.
Show in Report	Shows the field in the report.

Note: When the checkboxes are selected, they can be seen in red under the field details as shown below:

5. Click the "Value" input box, type as desired.
6. Click the "Text" input box, type as desired.

Note: To add a radio button, click the add button,  .

To remove a radio button, click the remove button,  .

7. Click the save button, .

Adding Button Field

1. Click the "Button" button, 

, the following items will appear on the screen:

2. Click the "Default" button, 

, once clicked the "Edit Field" for the Label step will appear on the right-hand side of the screen as shown below:

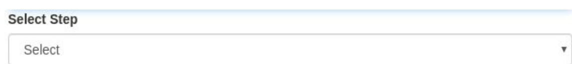
3. Click the "Label" input box, type as desired.

4. Click the “Class” dropdown box. The following dropdown menu will appear:

5. Select the desired button color.

6. Click the “Action” dropdown box. The following dropdown menu will appear:

The following actions are explained below:

Next Step	If the button is clicked, the next step will appear.
Previous Step	If the button is clicked, the previous step will appear.
Go to	If Go to action is used, the following additional dropdown box will appear:  Select the desired step that will appear after the button is clicked.

Finish Scripter	If the button is clicked, the scripter will finish.

7. Click the save button, .

Adding POST Field

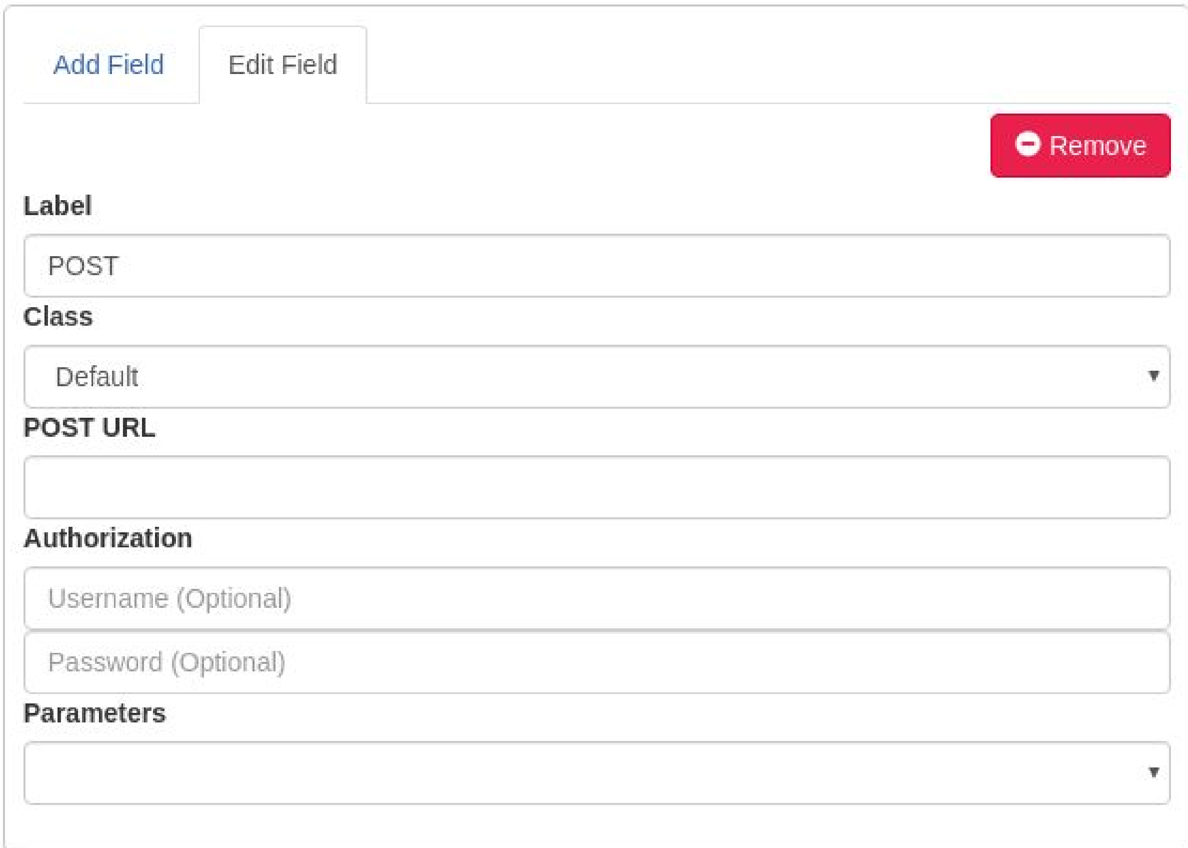
When using a CRM, it sends information to the web service to be pulled into CRM.

1. Click the “POST” button, 

, the following items will appear on the screen:

2. Click the “POST” button, 

, once clicked the “Edit Field” for the Label step will appear on the right-hand side of the screen as shown below:



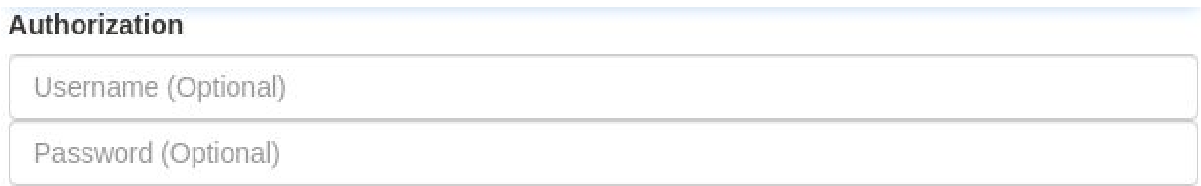
3. Click the “Label” input box, type as desired.

4. Click the “Class” dropdown box. The following dropdown menu will appear:

5. Select the desired POST button color.

6. Click the “POST URL” input box, type the desired URL.

7. Under the Authorization subtitle, there are two optional input boxes, as shown below:



If needed, type the Username and Password in the corresponding input boxes.

8. Click the “Parameters” dropdown box. The following dropdown menu will appear, as shown below:

The following parameters are explained below:

All Contact Data	Only pulls data from Call Center Studio tenant uploaded in the Contact section.

Scripter Data	Only pulls data from the scripter inputs.
All Contact Data with Scripter Data	Pulls both the Call Center Studio tenant data and the scripter inputs.

9. Click the save button, .

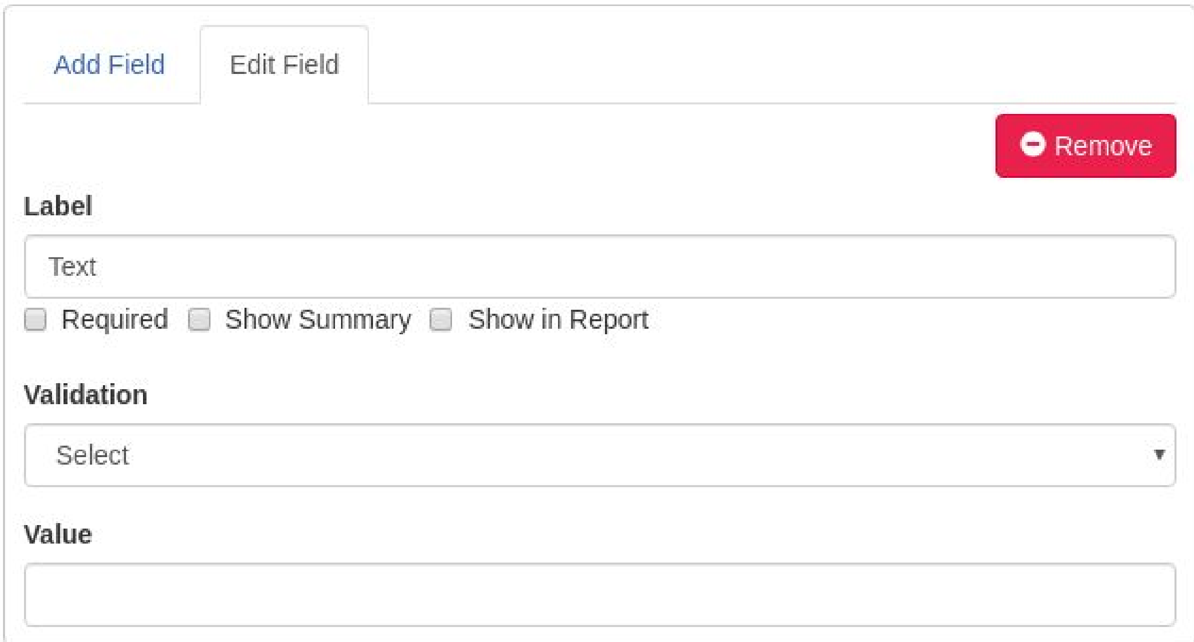
Adding Text Field

1. Click the “Text” button, 

, the following items will appear on the screen:

2. Double click the “Text” window once clicked it will become shaded as shown below:

Also, the “Edit Field” for the Label step will appear on the right-hand side of the screen, as shown below:



3. Click the “Label” input box, type as desired.

4. Check as desired, the checkboxes located below the “Label” input box, as shown below:

The following checkboxes are described below:

Required	Marks the following field as required.
Show Summary	Shows the following field. "Viewing a Scripter" section shows an example.
Show in Report	Shows the field in the report.

Note: when the checkboxes are selected, they can be seen in red under the field details as shown below:

5. Click the “Validation” dropdown box. The following dropdown menu will appear, as shown below:

6. Select the desired validation option.
7. In the “Value” input box, type as desired.
8. Click the save button, .

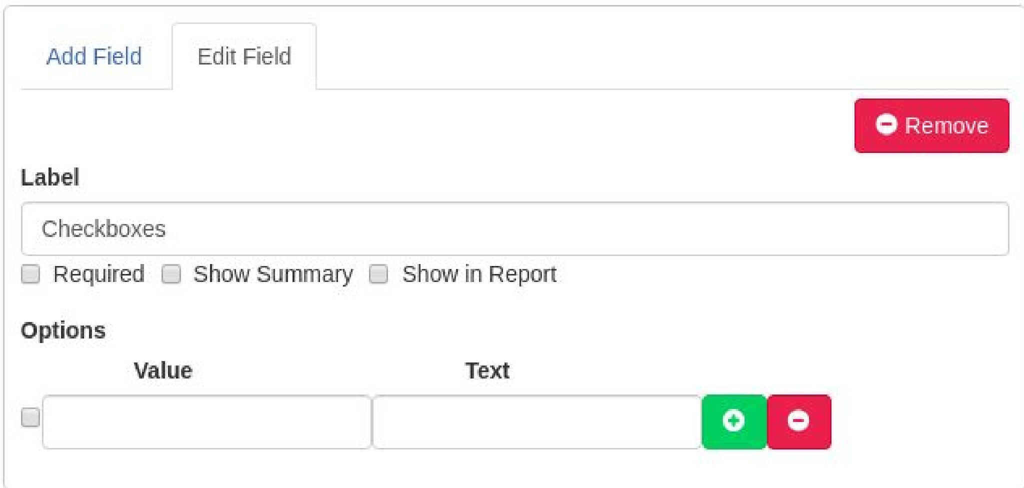
Adding Checkboxes Field

1. Click the “Checkboxes” button, 

, the following items will appear on the screen:

2. Double click the “Checkboxes” window once clicked it will become shaded as shown below:

Also, the “Edit Field” for the Label step will appear on the right-hand side of the screen, as shown below:



3. Click the “Label” input box, type as desired.

4. Check as desired, the checkboxes located below the “Label” input box, as shown below:

The following checkboxes are described below:

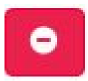
Required	Marks the following field as required.
Show Summary	"Viewing a Scripter" section shows an example.
Show in Report	Shows the field in the report.

Note: when the checkboxes are selected, they can be seen in red under the field details as shown below:

5. Click the “Value” input box, type as desired.
6. Click the “Text” input box, type as desired.

Note:

To add a checkbox, click the add button, .

To remove a checkbox, click the remove button, .

7. Click the save button, .

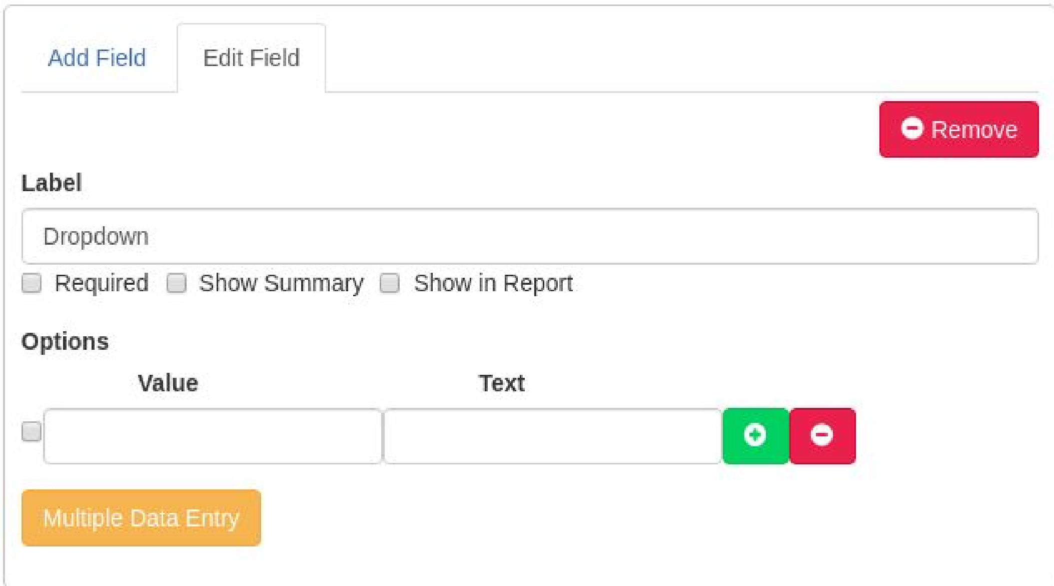
Adding Drop Down Field

1. Click the "Drop Down" button, 

, the following items will appear on the screen:

2. Double click the "Drop Down" window once clicked it will become shaded as shown below:

Also, the "Edit Field" for the Label step will appear on the right-hand side of the screen, as shown below:



3. Click the “Label” input box, type as desired.
4. Check as desired, the checkboxes located below the “Label” input box, as shown below:

The following checkboxes are described below:

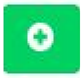
Required	Marks the following field as required.
Show Summary	"Viewing a Scripter" section shows an example.
Show in Report	Shows the field in the report.

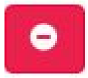
Note: when the checkboxes are selected, they can be seen in red under the field details as shown below:

5. Click the “Value” input box, type as desired.

6. Click the "Text" input box, type as desired.

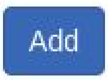
Note:

To add a dropdown selection, click the add button,  .

To remove a dropdown selection, click the remove button,  .

To perform multiple data entry, click the "Multiple Data Entry" button,

, the following window will appear:

Type as desired, then click the "Add" button, 

.

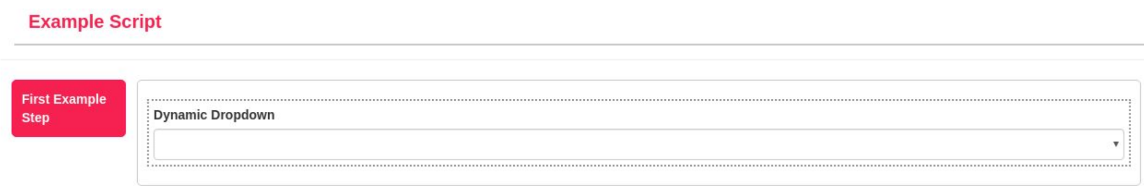
7. Click the save button,  .

Adding Dynamic Drop Down Field

When using a CRM, allows the dropdown box selection to change dynamically based on changes to a CRM.

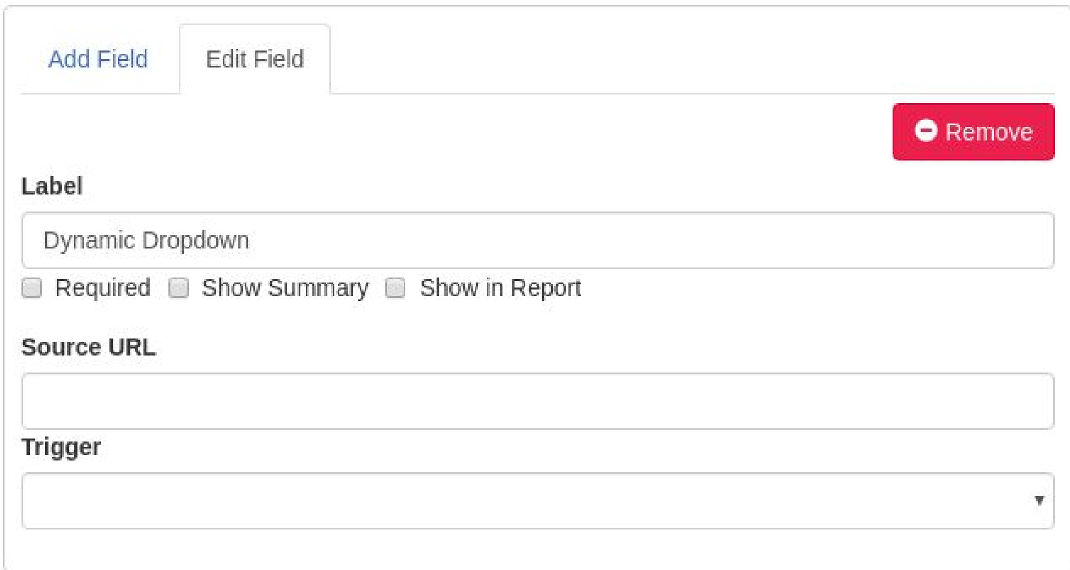
1. Click the "Dynamic Drop Down" button, 

, the following items will appear on the screen:



2. Double click the "Dynamic Drop Down" window once clicked it will become shaded as shown below:

Also, the "Edit Field" for the Label step will appear on the right-hand side of the screen, as shown below:



3. Click the “Label” input box, type as desired.
4. Check as desired, the checkboxes located below the “Label” input box, as shown below:

The following checkboxes are described below:

Required	Marks the following field as required.
Show Summary	"Viewing a Scripter" section shows an example.
Show in Report	Shows the field in the report.

Note: when the checkboxes are selected, they can be seen in red under the field details as shown below:

5. In the “Source URL” input box, type the desired source URL.
6. In the “Trigger” dropdown box, select the desired trigger.
7. Click the save button, .

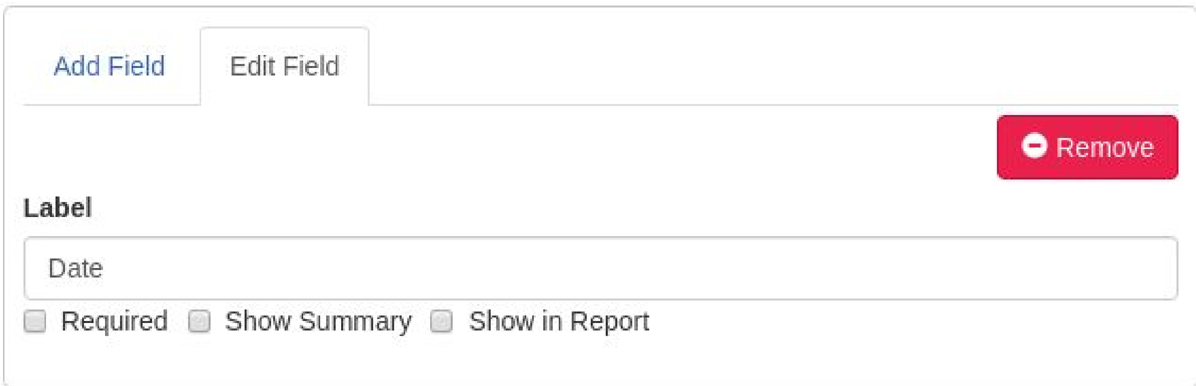
Adding Date Field

1. Click the "Date" button, 

, the following items will appear on the screen:

2. Double click the "Date" window once clicked it will become shaded as shown below:

Also, the "Edit Field" for the Label step will appear on the right-hand side of the screen, as shown below:



3. Click the "Label" input box, type as desired.

4. Check as desired, the checkboxes located below the “Label” input box, as shown below:

The following checkboxes are described below:

Required	Marks the following field as required.
Show Summary	"Viewing a Scripter" section shows an example.
Show in Report	Shows the field in the report.

Note: When the checkboxes are selected, they can be seen in red under the field details, as shown below:

5. Click the save button,  .

Editing a Field

1. Double click the desired field window, once clicked it will become shaded like the example shown below:

Also, the “Edit Field” for the desired step will appear on the right-hand side of the screen like the example shown below:

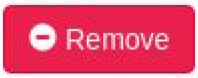
2. Make the desired changes.

3. Click the save button,  .

Deleting a Field

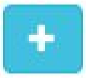
1. Double click the desired field window, once clicked it will become shaded like the example shown below:

Also, the "Edit Field" for the desired step will appear on the right-hand side of the screen like the example shown below:

2. Click the remove button, 

.

Adding a Scripter Step

1. Click the new button,  , in the top right corner, the following pop-up screen will appear:

2. Click the "Step Name" input box, type as desired. An example is shown below:

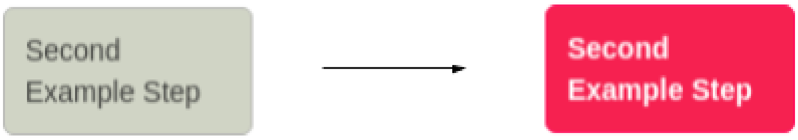
3. Click the save button, 

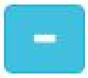
. The new step will be shown on the left-hand side of the scripter screen.

4. Click the save button,  .

Deleting a Scripter Step

1. Click the desired step, once clicked, the step will transition to red as seen below:

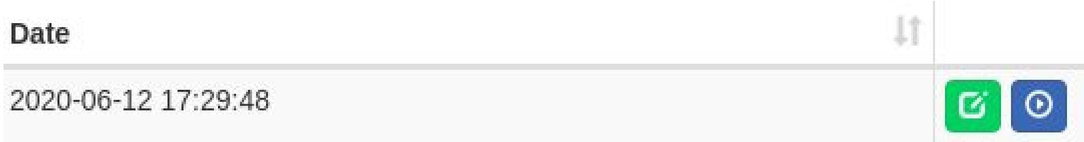


2. Click the delete button,  .

3. Click the save button,  .

Editing a Scripter

1. To edit a scripter, click the edit button, , located on the far right of the Scripter name after the "Date" column as shown below:



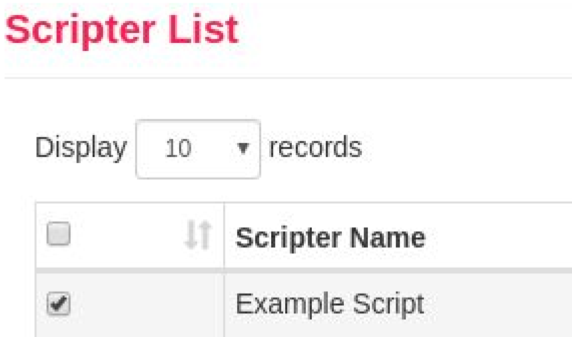
2. Make Changes as desired.

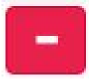
3. Click the save button, .

4. Click the return button, , to return to the Scripter list.

Deleting a Scripter

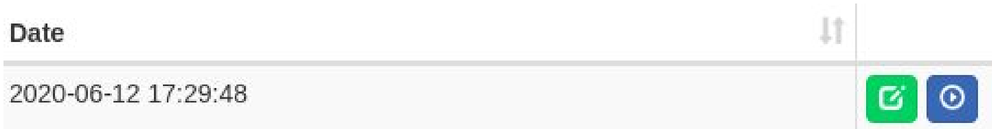
1. From the Scripter list, check the desired scripter, on right-hand side of the scripter name as shown below:



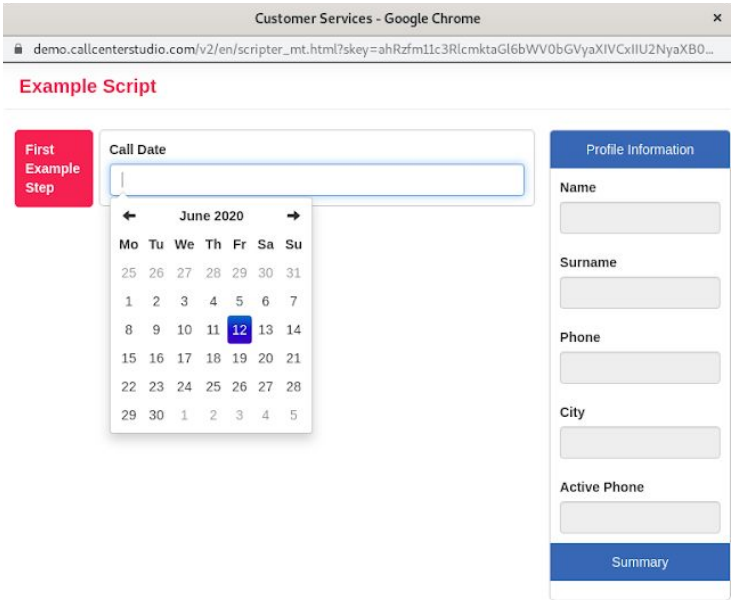
2. Confirm the deletion by clicking the delete button,  .

Viewing a Scripter

1. To view a scripter, click the view button, , located on the far right of the Scripter name after the edit button, , as shown below:

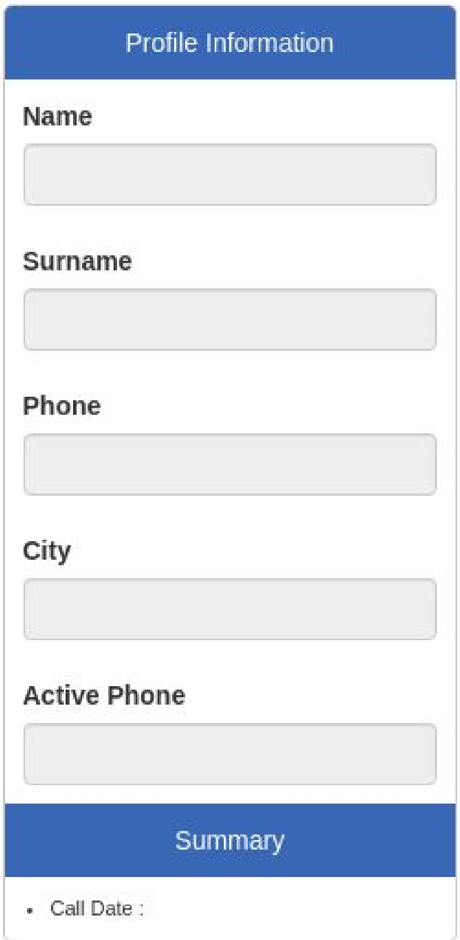


The following is an example pop-up window of the Example Script, showing a date step:



Note: The Profile information section on the right-hand side of the screen will pull information regarding the contact that is run through the campaign (assuming the information was added to the contact on the Call Center Studio contact list section.

Also, if "Show Field Summary" checkbox was selected for the fields, the field name will be displayed below the Profile Information section, as shown below:



2. After viewing, click the "X," ✕ , to exit.

Searching a Scripter

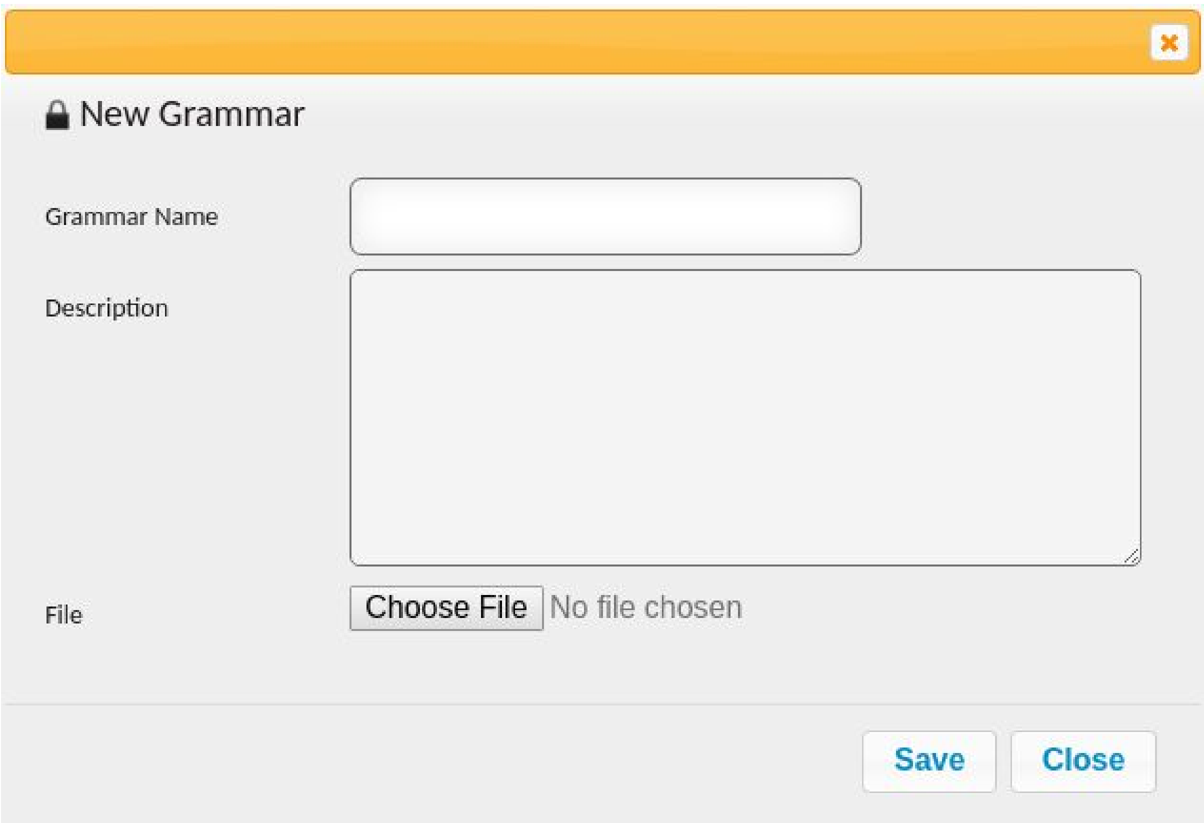
1. Click the “Search” input box, type the scripter’s name, the input box is shown below:

Note: Partial names can be used, when spelled correctly.

Grammar

Adding a Grammar

1. Click the new button, , in the top right-hand corner, the following pop-up screen will appear as shown below:

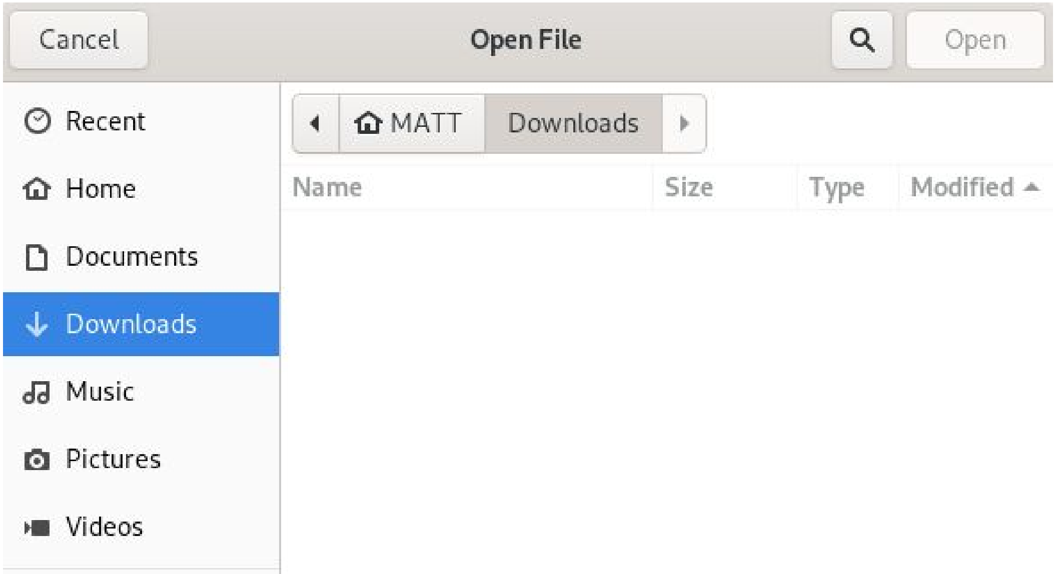


2. In the "Grammar Name" input box, type the desired name.

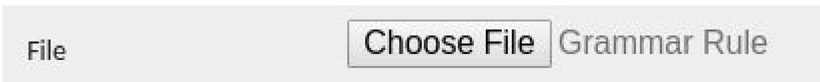
3. In the "Description" input box, if desired, type a description.

4. Click the "Choose File" button, 

. The file explorer will appear, as shown below:

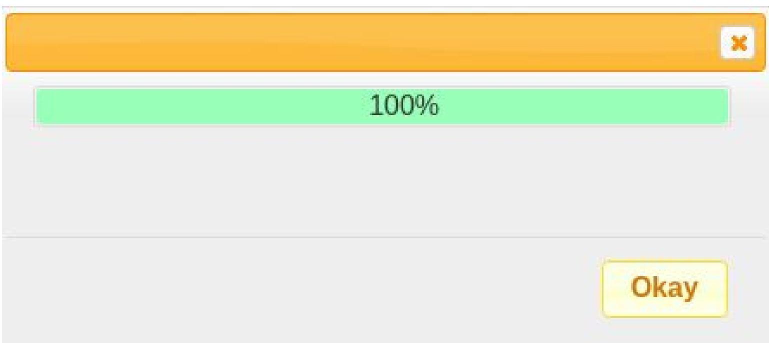


5. Double click the desired grammar file. The grammar rule will appear in the pop-up window, as shown below:



6. Click the save button, 

. The following pop-up window will appear:

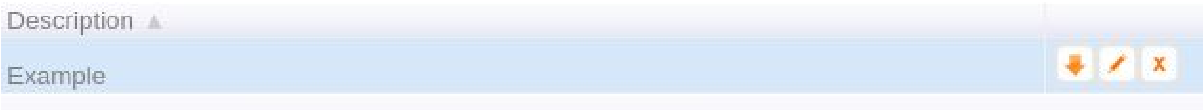


7. Click the okay button, 

. The newly created grammar will appear in the grammar name list, as shown below:

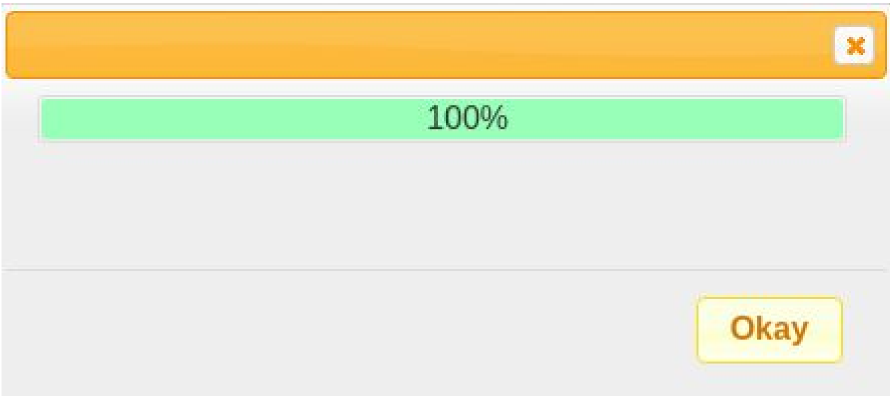
Editing a Grammar

1. To edit a grammar, click the edit button, , located on the far right of the Grammar name after the download button, , as shown below:



2. Make changes as desired.

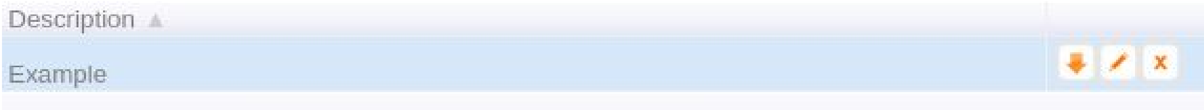
3. Click the save button, Save. The following pop-up window will appear:



4. Click the okay button, Okay.

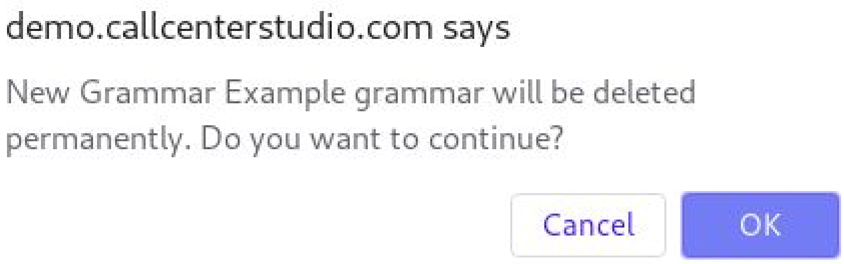
Downloading a Grammar

1. To edit a grammar, click the download button, , located on the far right of the grammar name after the "Description" column as shown below:



Deleting a Grammar

1. From the Grammar name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



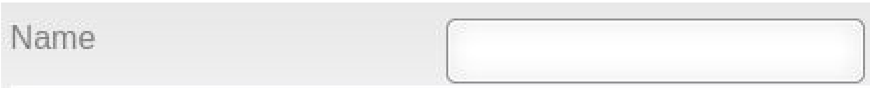
- *Select the cancel button, Cancel, to cancel the deletion.*
- *Select the OK button, OK, to confirm the deletion.*

2. Confirm the deletion by clicking the OK button, OK.

The screen will reload, and the deleted grammar will not be shown.

Searching for a Grammar

1. Click the “Name” input box, type the grammar’s name, the input box is shown below:

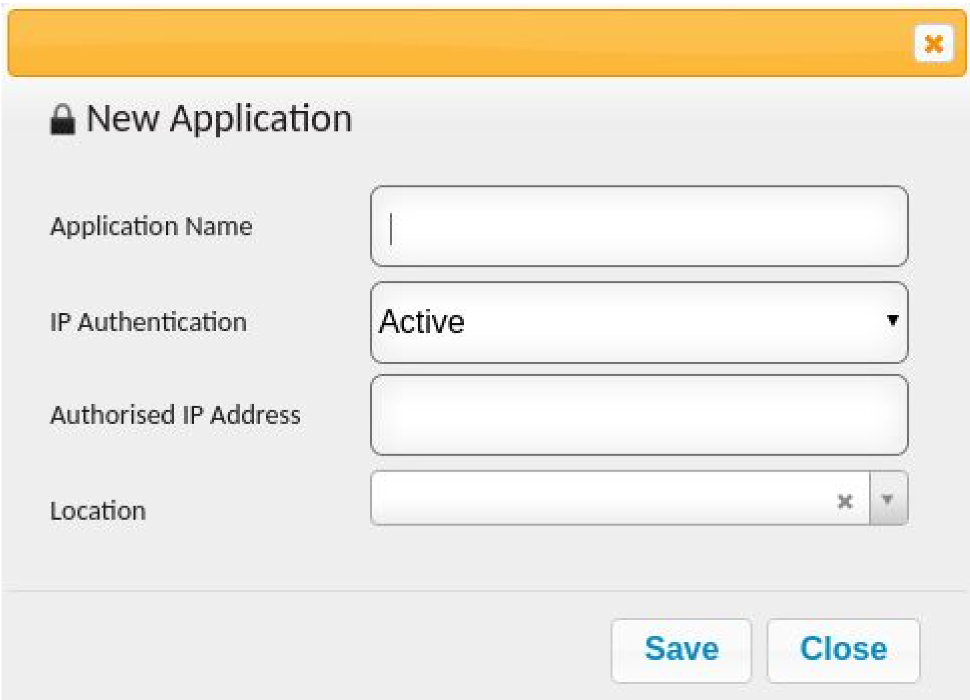


Note: Partial names can be used, when spelled correctly.

Applications

Adding an Application

1. Click the new button, , in the top right corner the following pop-up screen will appear as shown below:



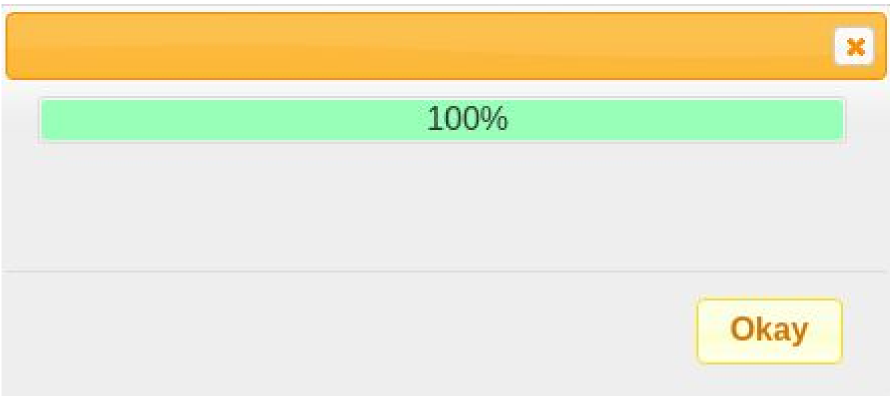
2. Click the "Application Name" input box, type the desired name.

3. Click the "IP Authentication" dropdown box. The following dropdown menu will appear:

Note: Only used when IP authorization is needed, "Active" needs to be selected. Otherwise, select "Passive."

4. Select the desired IP Authentication.
5. In the "Authorised IP Address" input box, type the authorized IP address.
6. If the created application is only desired to be used at specific locations, click the "Location" dropdown box and select the desired location (See the Location section for creating a location).
7. Click the save button, 

. The following pop-up window will appear:



8. Click the "Okay" button, 

.

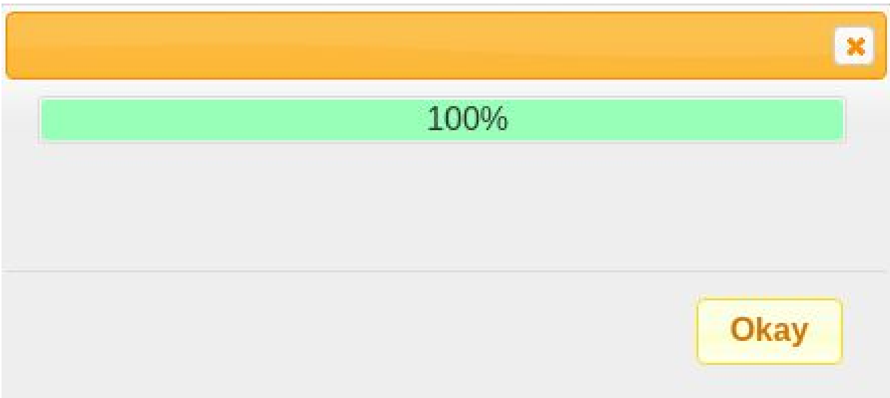
Editing an Application

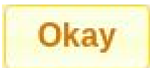
1. To edit an application, click the edit button, , located on the far right of the application name after the “Deleted” column as shown below:

2. Make changes as desired.

3. Click the save button, 

. The following pop-up window will appear:

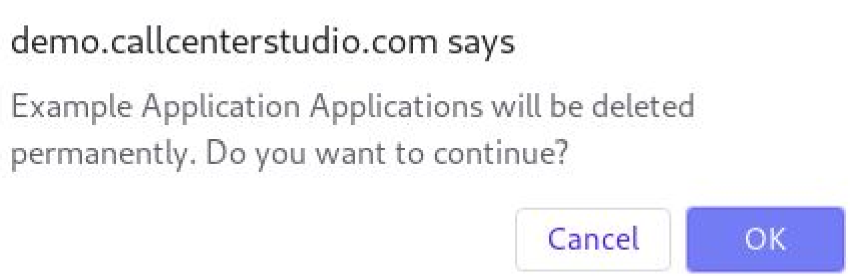


4. Click the okay button, 

.

Deleting an Application

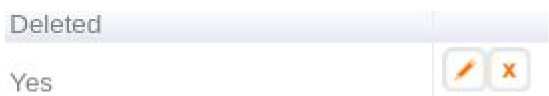
1. From the Application name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- *Select the cancel button, , to cancel the deletion.*
- *Select the OK button, , to confirm the deletion.*

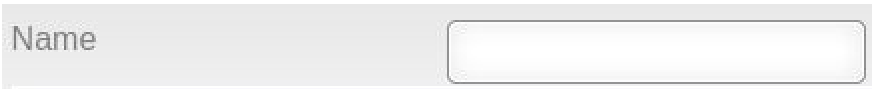
2. Confirm the deletion by clicking the OK button, .

The screen will reload and to the right of the deleted application name in the "Delete Column" will say "Yes" as shown below:



Searching for an Application

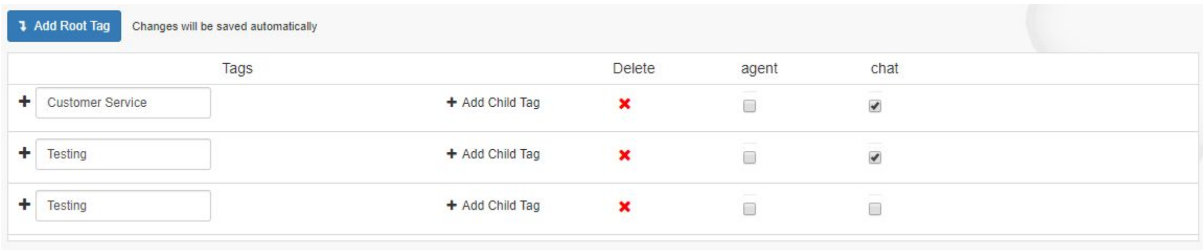
1. Click the "Name" input box, type the application's name, the input box is shown below:



Note: Partial names can be used, when spelled correctly.

<u>Tags</u>

Tags are the various methods through which managers and agents can quickly identify an individual call or set of calls. Tags are used to distinguish calls from one another and serve as a reminder for future actions. The image below is an outline of the tag section



Adding a tag

1. To create a root tag, click the add root tag 

button.

2. Input the desired name of the root tag in the blank section shown below

3. Select the “agent” or “chat” checkbox(es) as desired.

Creating a Child Tag

Child Tags are subtags to the Root Tag created.

1. Click the “Add Child Tag” button, 

, the following will be displayed below the Root Tag:

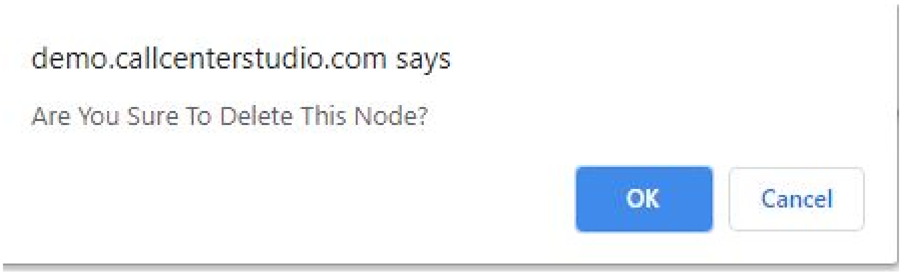
2. Type the desired name for the tag.
3. Select the “agent” or “chat” checkbox(es) as desired.

Editing a Tag or a Child Tag

1. For any tag or child tag, click the text input box of the tag’s name to modify the tag’s name.
2. Select and Deselect the “agent” and “chat” checkboxes as desired.

Deleting a Tag or a Child Tag

1. Tags can be deleted by pressing the delete button on the column of the desired tag. The following pop-up window will appear:



- *Selecting the cancel button,* Cancel *, will cancel the deletion.*
- *Selecting the OK button,* OK *, will confirm the deletion.*

The screen will reload and the deleted tag will not be shown.

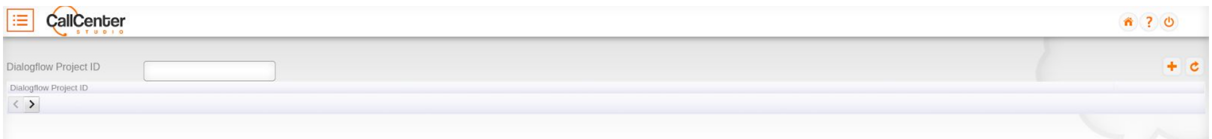
Note: the child tags must be deleted before deleting the root tag. Using the same instructions as above, child tags can be deleted.

Integrations

Some third-party integrations are built directly into the tenant. They can be found under the Integrations tab.

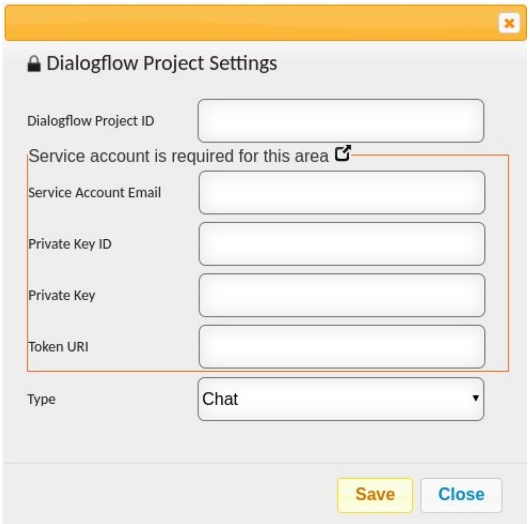
Note: Dialogflow is the only integration that is explained in the Call Center Studio Manual. If desired, other integrations can be set up by the assigned Call Center Studio Project Manager.

Select Dialogflow; the following screen will appear:



Creating a Dialogflow Project

1. Click on the add button, , located on the top right corner of the Dialogflow tab. The following will appear as shown below:



After creating a JSON private key in the Google Dialogflow account, the following information can be retrieved and entered into the input boxes (If experiencing issues, please contact the assigned Call Center Studio Project Manager):

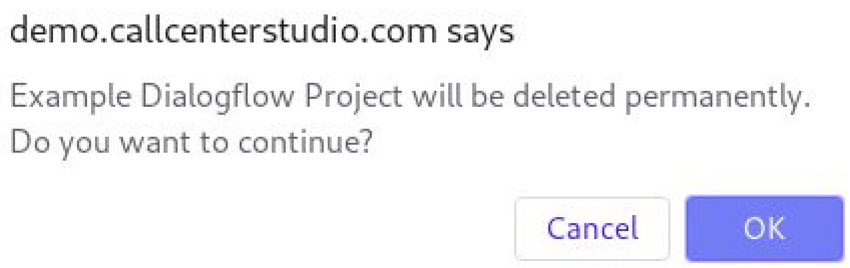
2. Click the “Dialogflow Project ID” input box, type the project ID from the JSON private key.
3. Click the “Service Account Email” input box, type the client email from the JSON private key.
4. Click the “Private Key ID” input box, type the private key id from the JSON private key.
5. Click the “Token URL” input box, type the token URL from the JSON private key.
6. Click the “Type” dropdown menu, select whether the Dialogflow will be used for chat or call.

Editing a Dialogflow Project

1. Click the edit button, , located to the far right of the project name.
2. Make the necessary changes.
3. Click the "Save" button, Save .

Deleting a Dialogflow Project

1. From the Dialogflow project name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



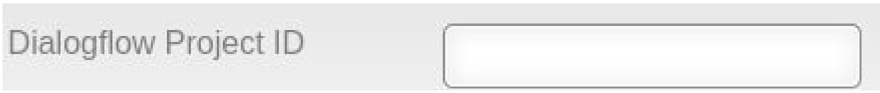
- *Selecting the cancel button,* Cancel *, will cancel the deletion.*
- *Selecting the OK button,* OK *, will confirm the deletion.*

2. Confirm the deletion by clicking the OK button, OK .

The screen will reload, and the deleted Dialogflow project will not be shown.

Searching for a Dialogflow Project

1. Click the “Dialogflow Project ID” input box, type the project name the input box is shown below:



Note: Partial names can be used, when spelled correctly.

Admin Activities

The Admin Activities section provides records of all admin activities: to include additions, modifications, and deletions. Through this section, all activities can be searched and filtered, as explained below.

Searching for an Activity

There are five ways to search for an Activity. Activities can be searched for using the separate filter options or a combination of filter options explained below:

Direct

All activities are listed in chronological order (most recent first) in the activity feed as shown below:

Action Date	User
2020-04-16 20:04:42	matthew.christina@callcenterstudio.com
2020-04-16 19:58:35	matthew.christina@callcenterstudio.com
2020-04-16 19:51:23	matthew.christina@callcenterstudio.com
2020-04-16 19:50:41	matthew.christina@callcenterstudio.com
2020-04-16 19:49:01	matthew.christina@callcenterstudio.com

1. Use the scroll bar on the right-hand side of the activity feed screen to scroll up and down to find the activity directly; the 75 most recent activities are shown. If desired, more activities can be displayed by clicking the "Show More" button,

   Show more , displayed in the middle at the bottom of the first 75 activities. As shown below:

2. After finding a specific activity, the activity can be viewed in detail by clicking the highlighted in blue Action Date as shown below:

Action Date

2020-04-16 20:04:42

Once the highlighted in blue Action Date, is clicked, the following information can be observed:

Action Details ×

Action Date: 2020-04-14 20:25:40

User Name: matthew.christina@callcenterstudio.com

Admin User Name:

App Token:

Resource Type: contact

Action: update

Details:

Resource ID: ahRzfm11c3RlcmktaGl6bWV0bGVyaXlUCxIHQ29udGFjdBiAgLjB5ZyOCgyiARlkZW1vLmNhbGxjZW50ZXJzdHVkaW8uY29t

Source IP: 37.130.123.208

Source UA: Mozilla/5.0 (X11; Linux x86_64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/79.0.3945.88 Safari/537.36

	OLD		NEW
1	listname=null	1	listname=null
2	nationalid=United States	2	nationalid=United States
3	workphone=null	3	workphone=null
4	description=null	4	description=Call Center
5	gender=	5	gender=
6	company=John's Call Center	6	company=John's Call Center
7	list=null	7	list=null
8	customerid=null	8	customerid=null
9	dateofbirth=2020-04-09	9	dateofbirth=2020-04-09
10	workaddress=null	10	workaddress=101 John's Way, Anywhere, USA, 10000
11	elastic_status=null	11	elastic_status=null
12	IsDeleted=false	12	IsDeleted=false
13	homeaddress=null	13	homeaddress=101 John's Way, Anywhere, USA, 10000
14	mobilephone=null	14	mobilephone=null
15	customfields=null	15	customfields=null
16	otherphone=null	16	otherphone=null
17	email=johnsmith@johnscallcenter.com	17	email=johnsmith@johnscallcenter.com
18	homephone=null	18	homephone=null
19	name=John Smith	19	name=John Smith
20		20	

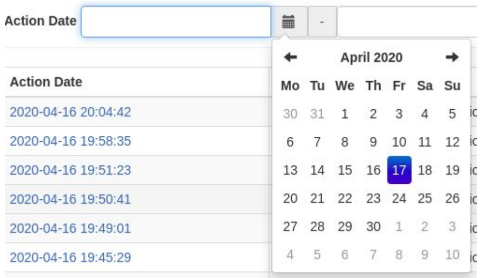
diff view generated by jsdifflib

As seen above, these action details show the update of a contact within the contacts section of the Administrator screen.

Action Date

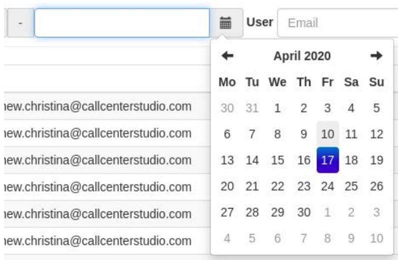
The activity can also be filtered according to a date range, as demonstrated below:

1. Click the "Action Date" start date input box. A calendar pop-up will appear to facilitate proper start date selection, as shown below:

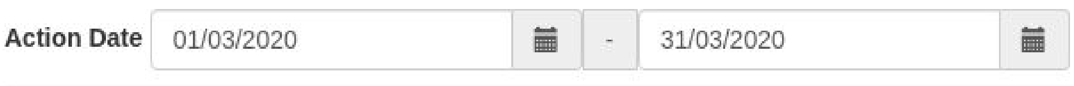


2. Select the desired start date range, as demonstrated below:

3. Click the "Action Date" end date input box. A calendar pop-up will appear to facilitate accurate end date selection, as shown below:



4. Select the desired end date range as demonstrated below:



5. Click the Apply Filter button, Apply Filter , the filtered date range will be displayed in the activity feed showing the start date range first as shown below:

Action Date	User
2020-03-30 17:23:09	cemal.yilmaz@callcenterstudio.com
2020-03-30 13:26:42	umut.turhan@callcenterstudio.com
2020-03-30 13:12:56	umut.turhan@callcenterstudio.com
2020-03-30 13:12:16	umut.turhan@callcenterstudio.com

User

1. Click the "User" input box, type the desired user's complete email address, as shown below:

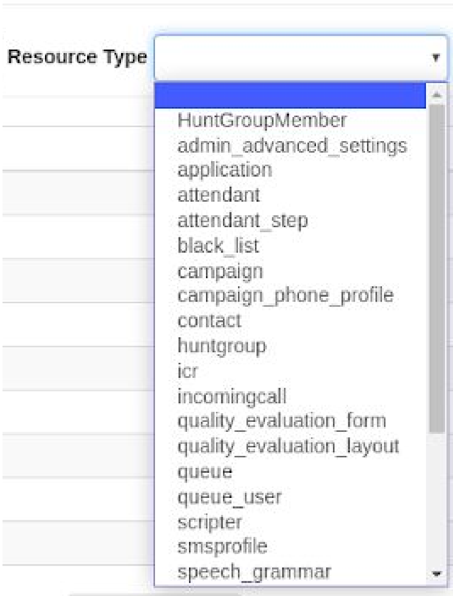
User matthew.christina@callcente

2. Click the Apply Filter button, Apply Filter , the filtered User range will be displayed in the activity feed showing the most recent date range first as shown below:

Action Date	User
2020-04-16 20:04:42	matthew.christina@callcenterstudio.com
2020-04-16 19:58:35	matthew.christina@callcenterstudio.com
2020-04-16 19:51:23	matthew.christina@callcenterstudio.com
2020-04-16 19:50:41	matthew.christina@callcenterstudio.com

Resource Type

1. Click the “Resource Type” input box. A dropdown list will appear to facilitate proper resource type selection, as shown below:



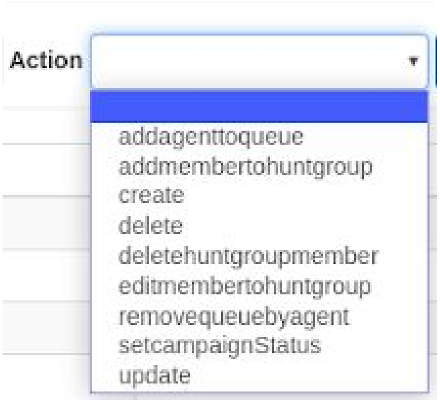
2. Choose the desired Resource Type; an example is displayed below:

3. Click the Apply Filter button, 

, the filtered resource type range will be displayed in the activity feed showing the most recent date range first as shown below:

Action

1. Click the “Action” input box. A dropdown list will appear to facilitate accurate action selection, as shown below:



2. Using the dropdown list, choose the desired action. An example is displayed below:

3. Click the Apply Filter button, 

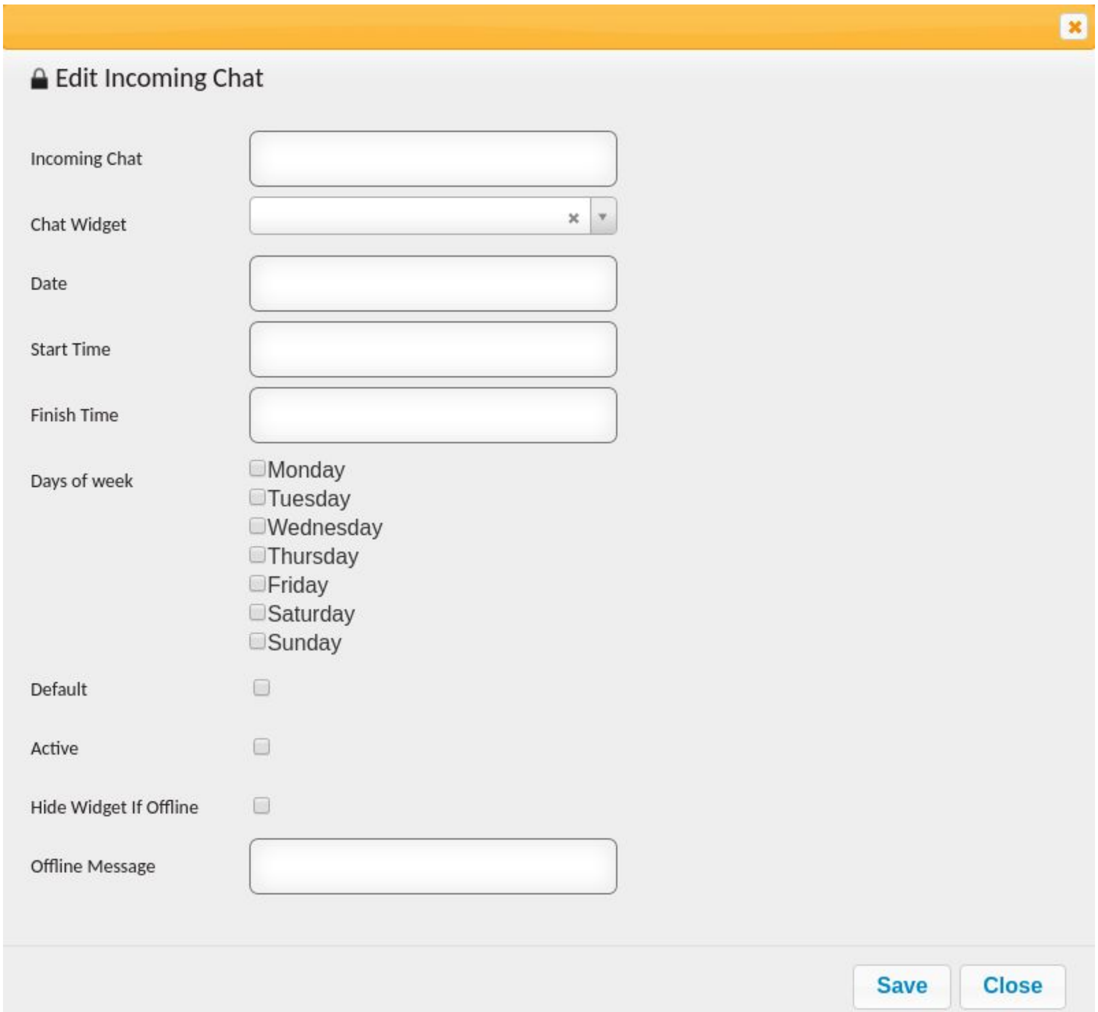
, the filtered action range will be displayed in the activity feed showing the most recent date range first as shown below:

Incoming Chat

All chats need an incoming chat associated with them. This section is to activate the chat and, if desired, create time constraints when the chat is in use.

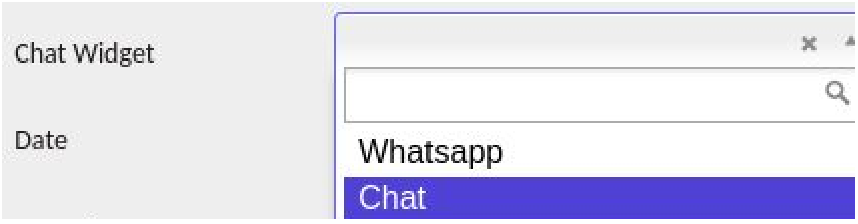
Creating an Incoming Chat

1. Click the New button, , located in the top right corner of the incoming chat screen. The following pop-up screen will appear, as shown below:



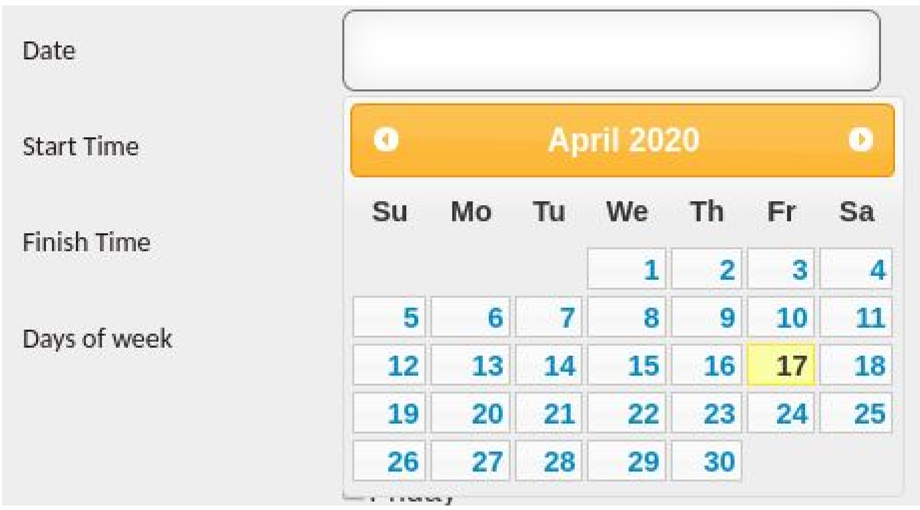
2. Click the "Incoming Chat" input box, type the desired incoming chat name as seen below:

3. Click the "Chat Widget" input box, a dropdown of created chat widgets will appear (See **Chat Widgets** > **Creating a Chat Widget** section for details on creating a chat widget) as shown below:



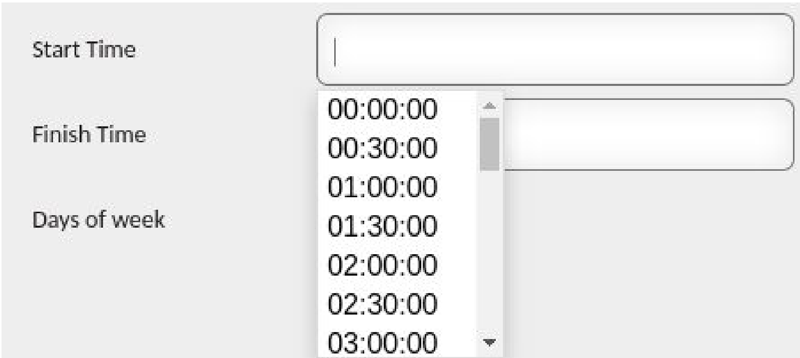
4. Select the desired chat widget; an example is displayed below:

5. Click the "Date" input box. A calendar pop-up will appear to facilitate accurate date selection, as shown below:



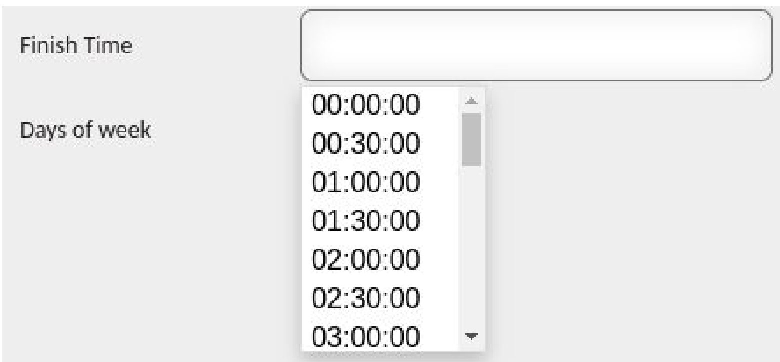
6. Select the desired date; an example is displayed below:

7. Click the "Start Time" input box. A dropdown list will appear to facilitate accurate start time selection, as shown below:



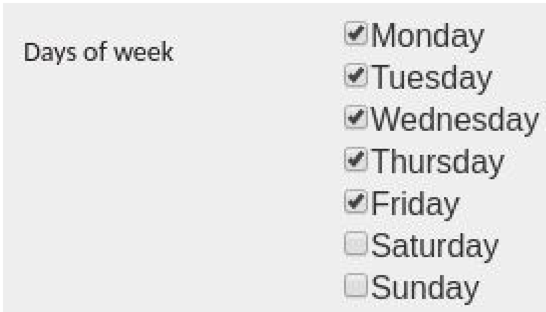
8. Select the desired start time; an example is displayed below:

9. Click the "Finish Time" input box. A dropdown list will appear to facilitate accurate finish time selection, as shown below:

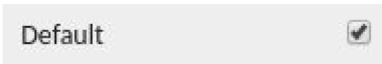


10. Select the desired finish time; an example is displayed below:

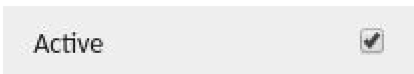
11. In the days of the week section, Select the checkboxes for the days of the week that the incoming chat will appear on the agent's screen, an example is displayed below:



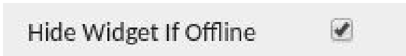
12. If the desired the "Default" box can be checked to allow the chat to make the following incoming chat rules the default:



13. Check the "Active" checkbox. The checkbox needs to be selected for the chat to be used as shown below:

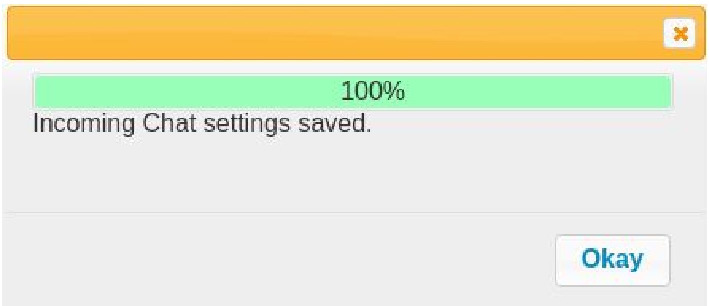


14. Check the "Hide Widget if Offline" checkbox to hide the incoming chat widget if offline. When the chat widget is embedded in a website, the chat icon will not appear for visitors if there are no available agents) as shown below:

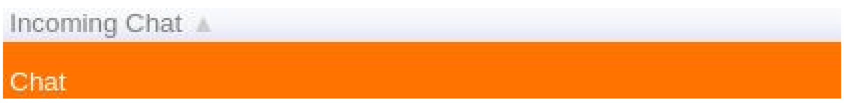


15. Click the "Offline Message" input box (offline messages are only used if the "Hide Widget if Offline" checkbox is selected) type an offline message an example is shown below:

16. After all the desired additions have been made, click the save button, Save , the following pop-up window will appear:

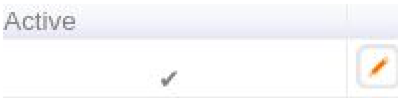


17. Click the Okay button, Okay , to acknowledge the addition. The new incoming chat will be located in the Incoming Chat list as seen below:

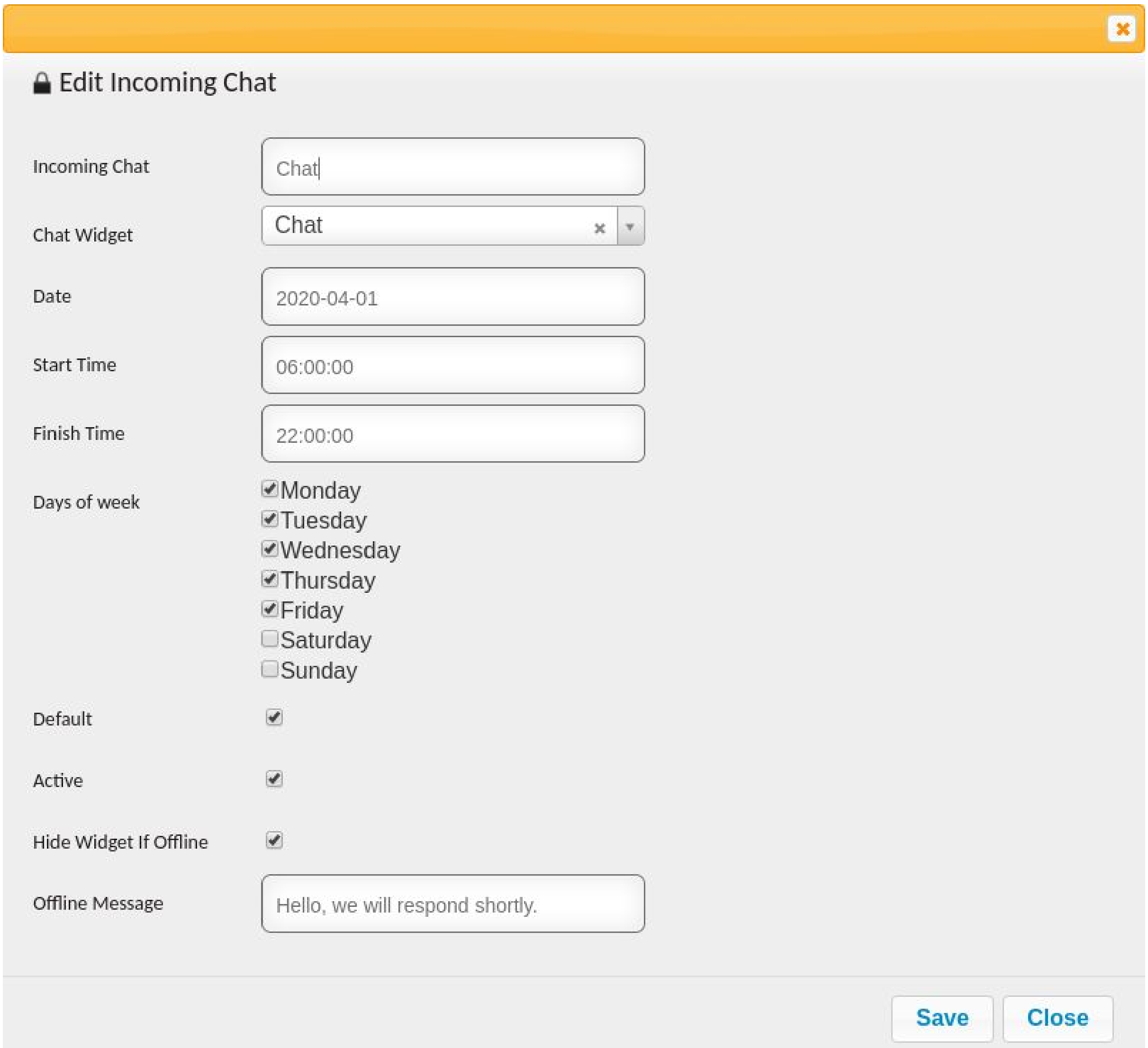


Editing an Incoming Chat

1. To edit an Incoming Chat, click the edit button, , located on the far right of the Incoming Chat Name after the “Active Column” as shown below:

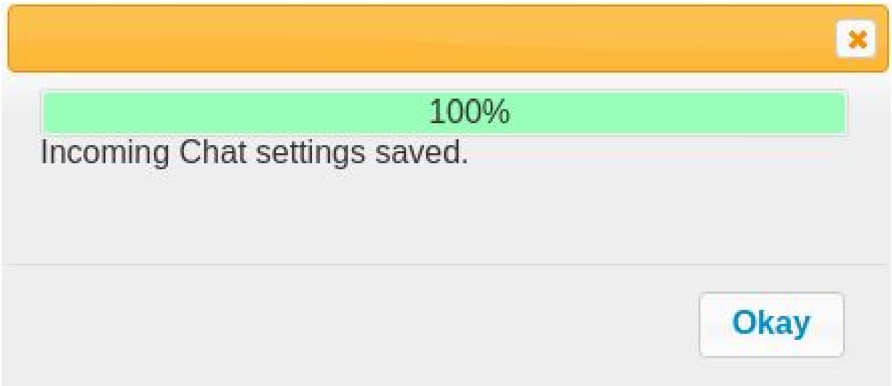


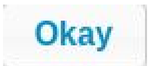
After clicking the edit button, the incoming chat pop-up window will appear as shown:



2. Make changes as desired.
3. Once the desired changes have been completed, the information can be saved by clicking the save button, 

, the following pop-up box will appear:

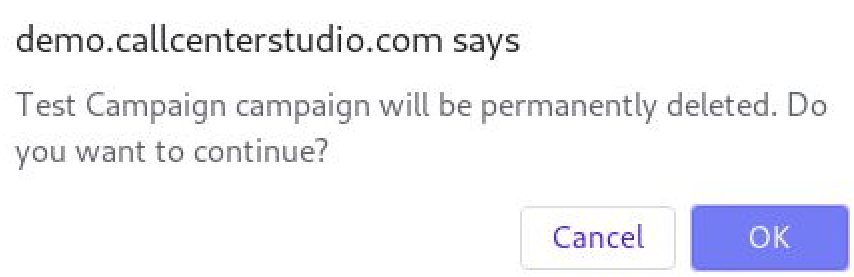


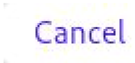
4. Click the Okay button, 

, to confirm the changes.

Deleting an Incoming Chat

1. From the Incoming Chat Name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- *Select the cancel button,* 

, to cancel the deletion.
- *Select the OK button,* 

, to confirm the deletion.

2. Confirm the deletion by clicking the OK button, 

.

The screen will reload, and the deleted incoming chat will not be shown.

Searching for an Incoming Chat

1. Click the "Incoming Chat" input box, type the incoming chat's name as shown below:

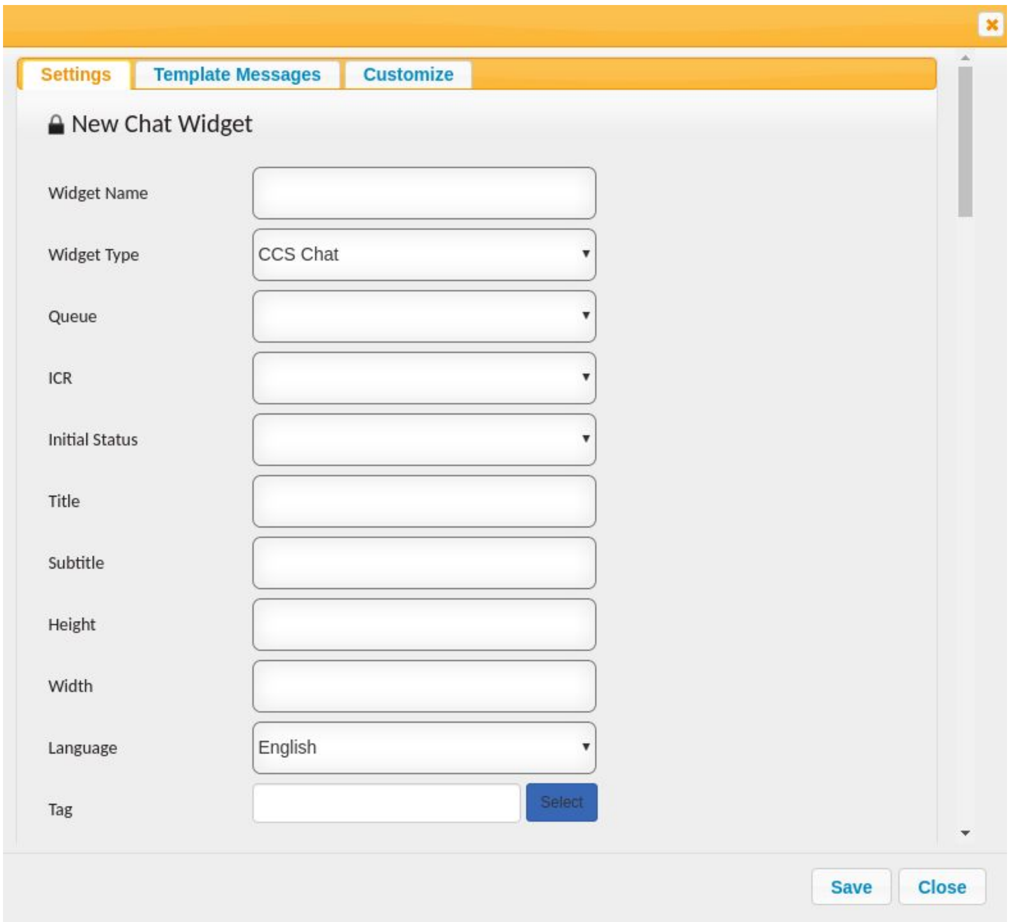
Note: Partial names can be used, when spelled correctly.

Chat Widgets

Creating a CCS Chat Widget (Settings Tab)

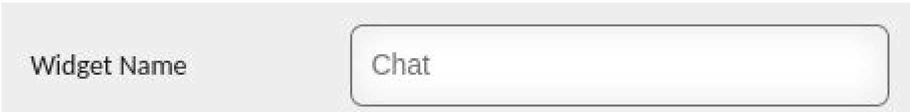
CCS chat widget is another name for creating a web chat widget.

1. Click the "New" button, , located in the top right corner of the Chat Widget screen, the following pop-up screen will appear as shown below:



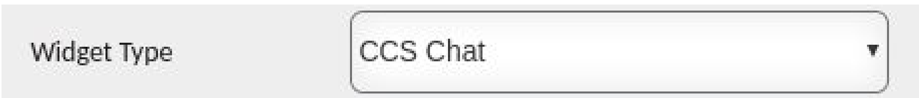
Note: All the input boxes are not shown in this photo; the user has to use the scroll bar on the right-hand side of the input box to view the additional input boxes.

2. Click the "Widget Name" input box, type the desired name an example is shown below:

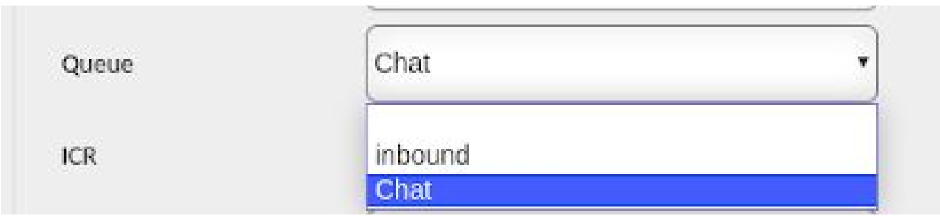


3. Click the "Widget Type" input box. A dropdown menu will appear an example is shown below:

4. Select the "CCS Chat" widget from the dropdown list an example selection is shown below:

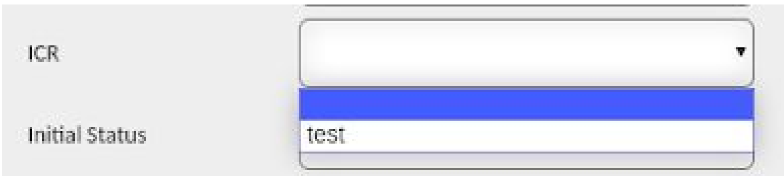


5. Click the "Queue" input box, a dropdown menu will appear with available queue selections (See Queue Section to enable chat on a queue) an example is shown below:



6. Select the desired queue from the dropdown list an example selection is shown below:

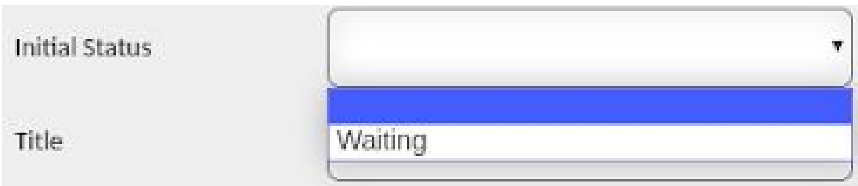
7. Select the "ICR" input box, a dropdown menu will appear with ICR selections (See the ICR section for more details) an example is shown below :



Note: Interactive Chat Response brings an IVR tree to a chat platform. It can be used in all chat channels, webchat, Facebook, WhatsApp, etc. It enables customers to self select their queues, make requests, etc.

8. Select an ICR from the dropdown list, if desired. An example selection is shown below:

9. Click the "Initial Status" input box a dropdown menu will appear. An example is shown below:



Note: This selection can only be used when an ICR is not used. This status is used for reporting to show the initial status as "waiting," "blank," or "ICR Status."

10. Select the desired initial status or none at all from the dropdown selection, an example selection is shown below:

11. Click the “Title” input box, type a name for the Chat (Customer will be able to see the title when using webchat only) an example is shown below:

12. Click the “Subtitle” input box, type a name for the subtitle of the chat (can be the same as the chat title) an example is shown below:

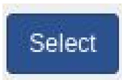
Note: A subtitle needs to be entered to create the chat widget.

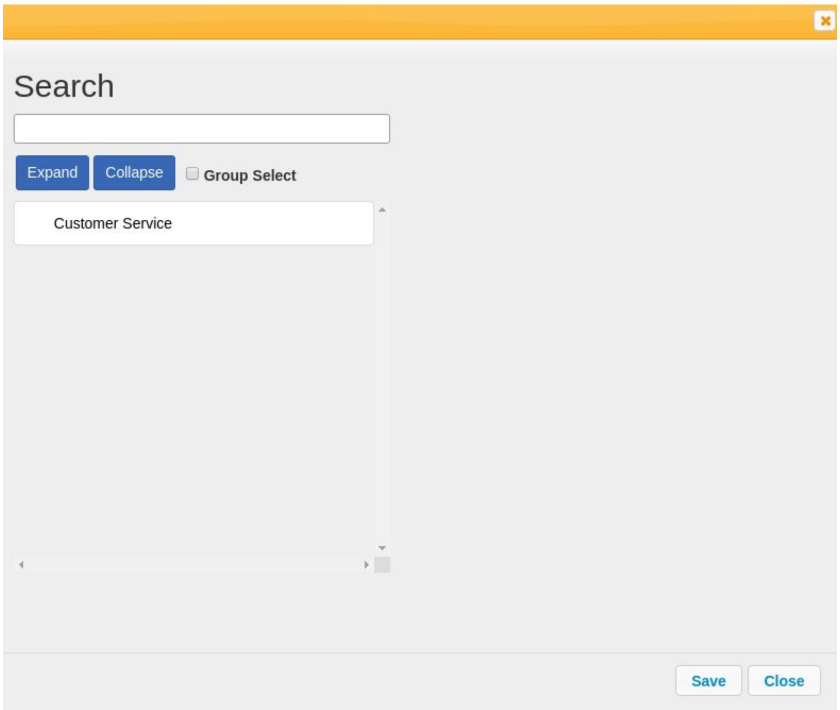
13. Click the “Height” input box type the desired height (Pixels) of the chat window. An example is shown below:

14. Click the “Width” input box type the desired width (Pixels) of the chat window. An example is shown below:

15. Click the “Language” input box. A dropdown list of added languages to the tenant will appear in the following example Turkish, and English were added to the tenant as shown below (Other languages can be added by contacting the Call Center Studio Project Manager):

16. Select the desired language from the dropdown list. An example is shown below:

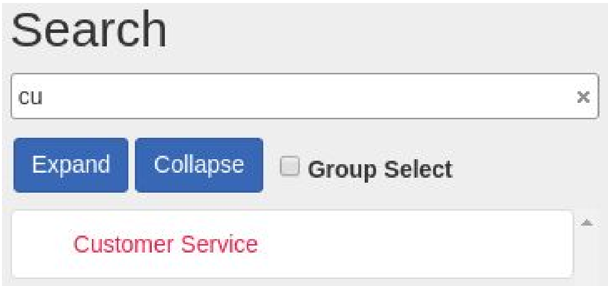
17. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:



Note: Only Tags made available for the chat can be viewed here (See **Tag** *Section)*

18. Search for a Tag using the "Search" input box shown below:

Note: Partial Tag names can be used for searching purposes. All Tags with the partial name will have their name appear in red font as shown below:



Note:

Press the Expand button, 

, to expand the selection (Used for child tags)

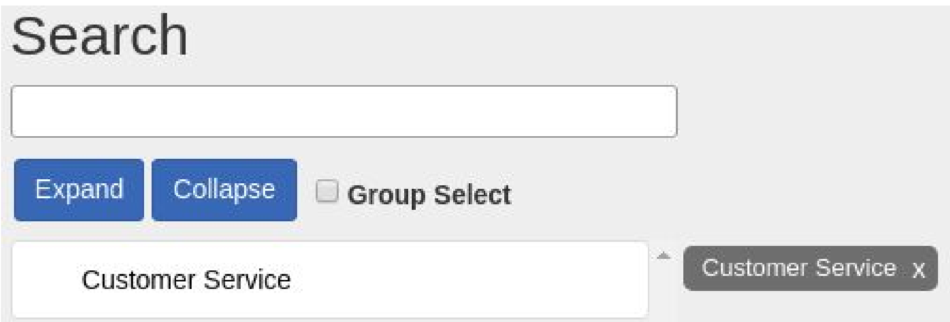
Press the Collapse button, 

, to collapse the selection (Used for child tags)

Check the Group Select Checkbox, 

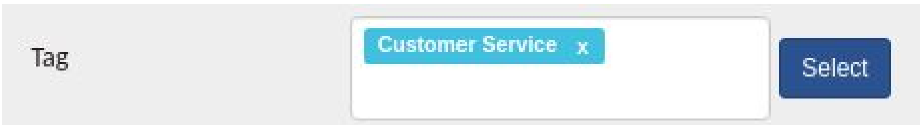
, to group select tags

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



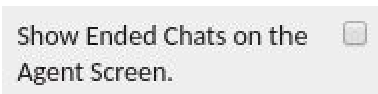
Note: To delete a Tag from the selection simply click the "X," x, to the right of the tag name.

19. Once the desired Tag selections have been selected, they can be viewed to the right of the tag list box click the save button, Save, the "Tag" input box with an example selection is shown below:

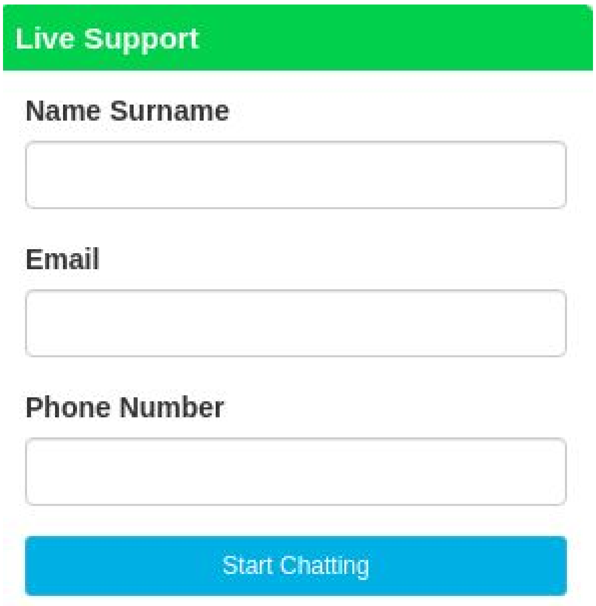


20. Click the "Support Email" type the desired support email. An example is shown below:

21. Following the Support Email input box, there are three checkbox selections outlined below to select the desired checkboxes:

	Makes the email input field optional when a customer starts a chat (See example below).
	Makes the phone number input field optional when a customer starts a chat (See example below).
	Shows the ended chat on the agent screen.

Below is an example chat window: If the "Email Optional" and "Phone Optional" checkboxes are left unchecked, the visitor of the website will have to input this data before starting the chat:



22. Click the "Title Background Color" input box. A color palette will appear, as shown below:

Note: the default color code is "FFFFFF" representing the color white. All colors within the palette have unique color codes so they can be duplicated.

23. Select the desired custom color an example selection is shown below:

24. Click the "Title Text Color" input box, repeat steps 20 -21.

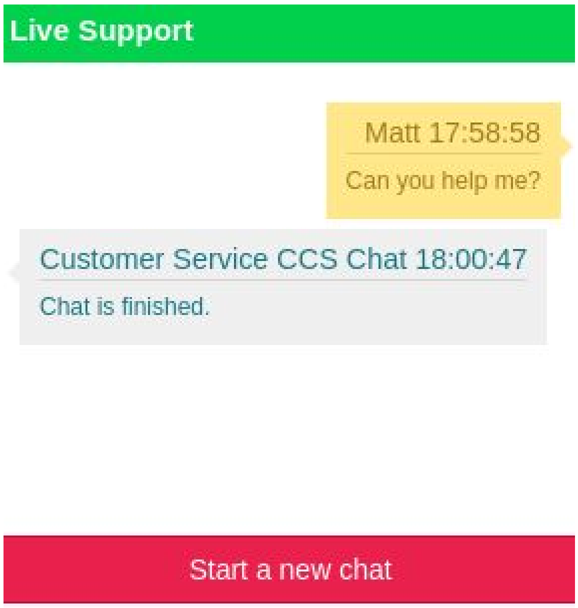
25. Click the "Start button Color" input box, repeat steps 20-21.

26. Click the "Send button Color" input box, repeat steps 20-21.

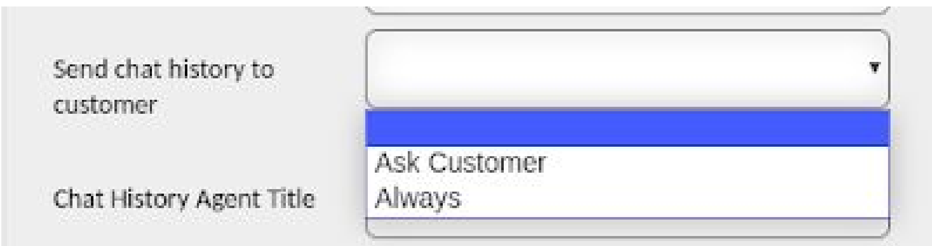
27. Click the "Logout button Color" input box, repeat steps 20-21, an example is shown below once all of the custom color selections have been completed:

28. Click the “System Nickname” Input box, if desired, type a system nickname the example is shown below:

The system nickname is shown at the top of each message sent an example is shown below:



29. Click the “Send Chat History to Customer” input box, a dropdown list will appear with the following two options:

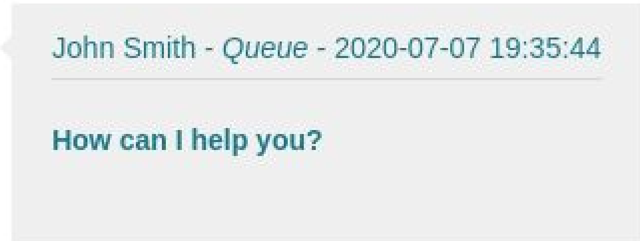


Note: the selection can also be left blank.

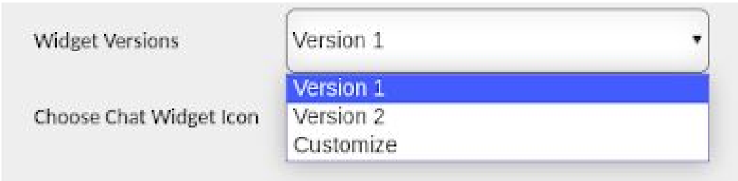
30. Select the desired option; an example selection is shown below:

31. Click “Chat History Agent Title”, type a title an example is shown below:

Note: This screenshot has been taken from the Chat Record in the Quality Control using the Chat History Tab, The “Chat History Agent Title” can be found in between the agent’s name and the chat date as shown below:



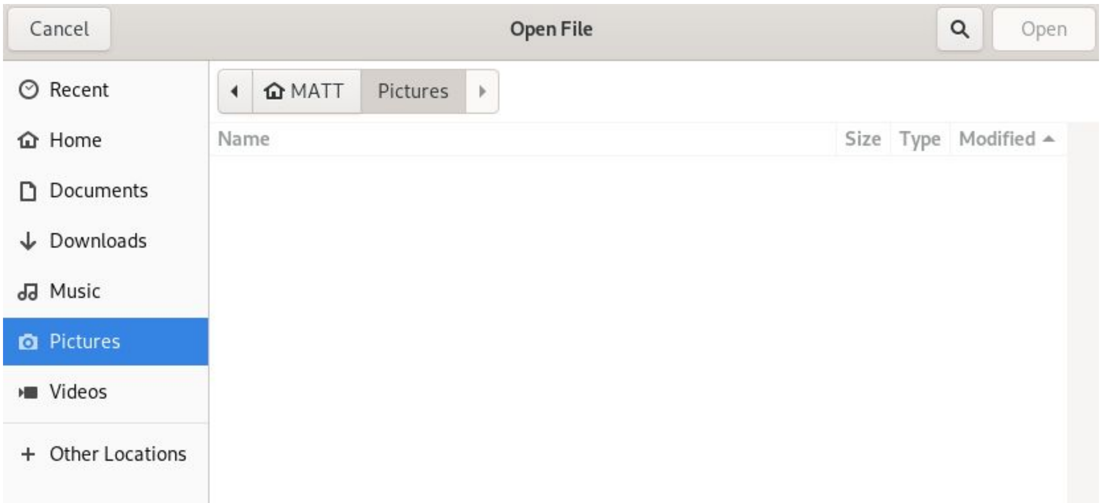
32. Click the “Widget Versions” input box, a dropdown list of created widget versions will be displayed along with a customize option an example dropdown selection is shown below:



Version 1	Shows the chat window on the customer’s screen with square corners. (Used for webchat aka CCS Chat)
Version 2	Shows the chat window on the customer’s screen with rounded corners. (Used for webchat aka CCS Chat)
Customize	Shows the chat window on the customer’s screen with rounded corners, and a custom logo can be added to the chat window as well. (Used for webchat aka CCS Chat)

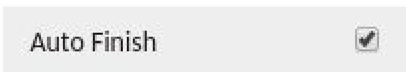
33. Select the desired widget version an example selection is shown below:

34. To the left of the title "Chose Chat Widget Icon," (Used exclusively for creating an icon for the webchat (aka CCS Chat) files can be uploaded in .png, .jpeg, .jpg) click the choose file button, Choose File , to create a custom chat icon from saved photos on the device. A pop-up window will appear showing the saved files as shown below:



35. If a custom icon is desired, navigate to the appropriate saved location, and select the appropriate image. Once selected, the pop-up window will show the saved image. An example is shown below:

36. Next to the "Auto Finish" checkbox, check auto finish if desired to auto finish the chat, the checked "Auto Finish" checkbox is shown below:



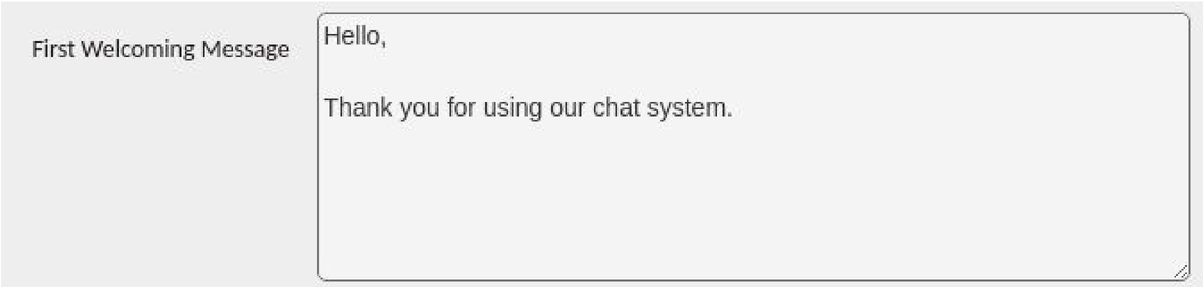
37. In the “Auto Finish Duration” input box type the desired time frame for the chat to auto finish (only can be used if the “Auto Finish” checkbox is checked) an example time frame is shown below:

38. Click the “Action Type After Parking” input box a dropbox will appear. Select, if desired, the appropriate action after parking. The three actions are described below:

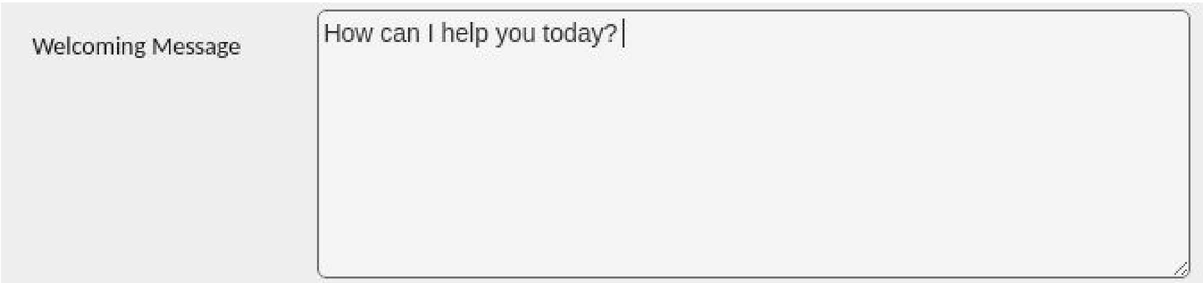
	When parking is pressed by the agent, the customer will be transferred to the queue.
	When parking is pressed, the customer will be placed on hold. Agents can answer other chats, but when the customer responds, the same agent will receive the chat.
	When parking is pressed, the customer will be transferred to the ICR assigned to the chat widget.

Note: Parking is used by the agent to transfer the customer to the queue, put the customer on hold, or transfer the agent to an IVR as described above. The agent must know what parking means for each chat widget.

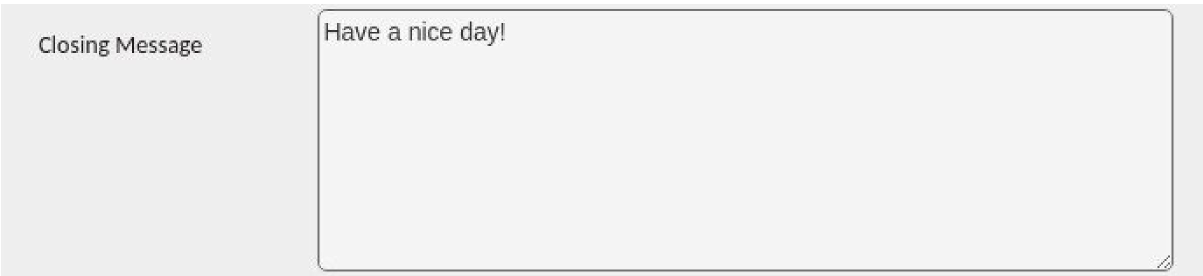
39. In the “First Welcoming Message” input box, type a first welcoming message for the chat if desired an example is shown below:



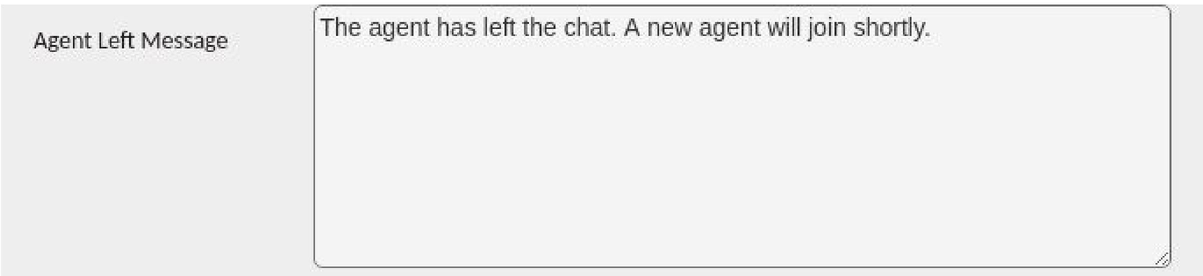
40. In the “Welcoming Message” input box, type a welcoming message for the chat if desired an example is shown below:



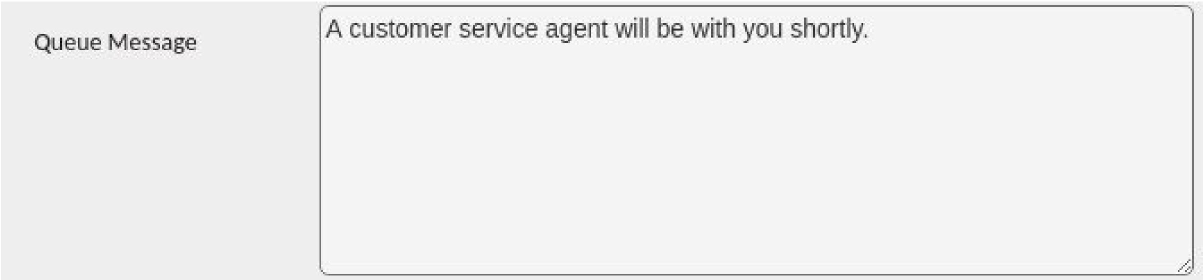
41. In the “Closing Message” input box, type a closing message for the chat if desired an example is shown below:



42. In the “Agent left Message” input box, type an Agent Left message for the chat if desired an example is shown below:

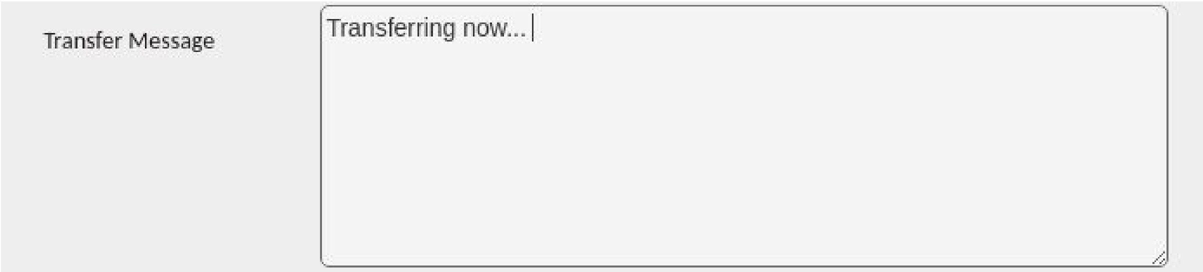


43. In the “Queue Message” input box, type a queue message for the chat if desired an example is shown below:

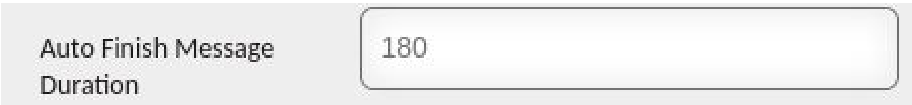


44. In the “Auto FInish Message” input box, type an auto finish message for the chat if desired an example is shown below:

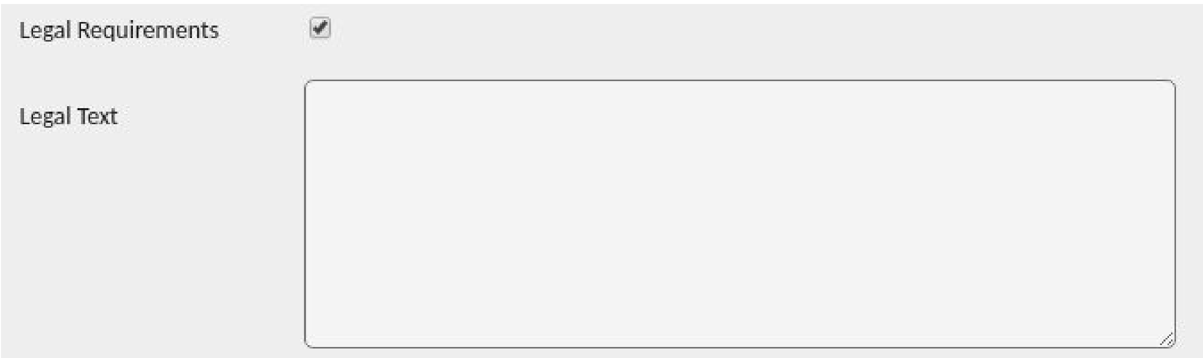
45. In the “Transfer Message” input box, type a transfer message for the chat if desired an example is shown below:



46. In the “Auto Finish Duration” input box, type a time duration for the chat to Auto Finish if desired an example is shown below:

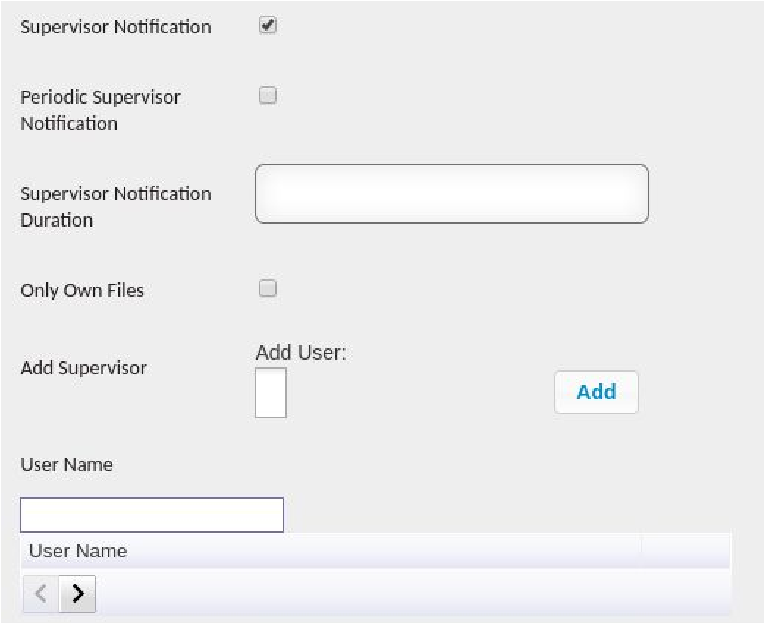


47. If a legal message is desired in the chat check the checkbox entitled “Legal Requirements,” when the box is checked the following “Legal Text” input box will be displayed:



48. If desired in the “Legal Text” input box type the desired legal text.

49. If supervisor notifications are desired for the chat, check the checkbox entitled "Supervisor Notification," when the box is checked the following will be displayed:

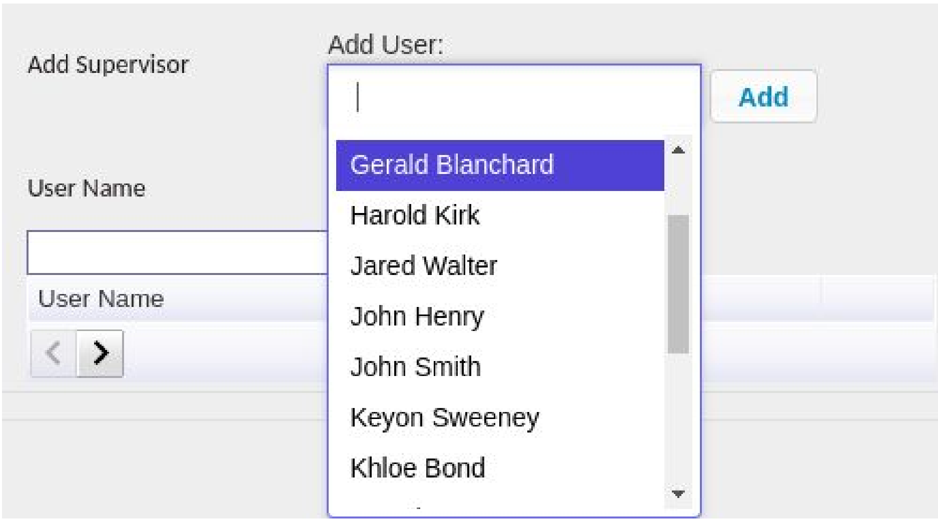


50. If periodic supervisor notification is desired, check the "Periodic Supervisor Notification" checkbox as displayed below (When selected if an agent does not respond within the Supervisor Notification Duration to a customer's chat, the supervisor will receive a notification):

51. Click the "Supervisor Notification Duration" input box, type the desired supervisor notification duration an example is displayed below:

52. Check the “Only Own Files” checkbox. An example is shown below (When selected agents cannot upload files from their desktop to send to a customer, they can only use the template messages created in the tenant with attachments):

53. Click the “Add Supervisor” input box and start typing the name of the supervisor. A dropdown list will appear to facilitate in choosing a supervisor as shown below:



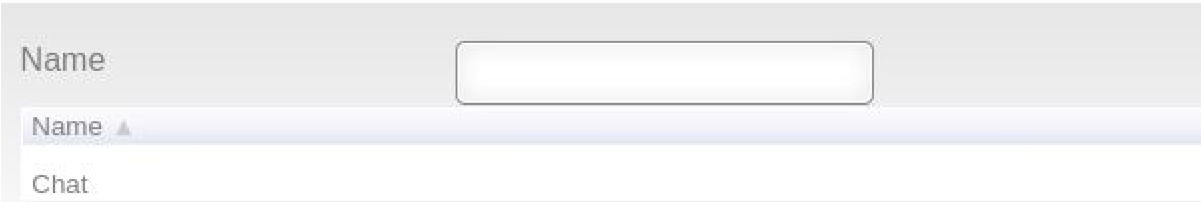
54. Select the desired Supervisor and click the add button, 

.

55. The supervisor’s name will appear in the “User Name” field an image of this field is shown below:

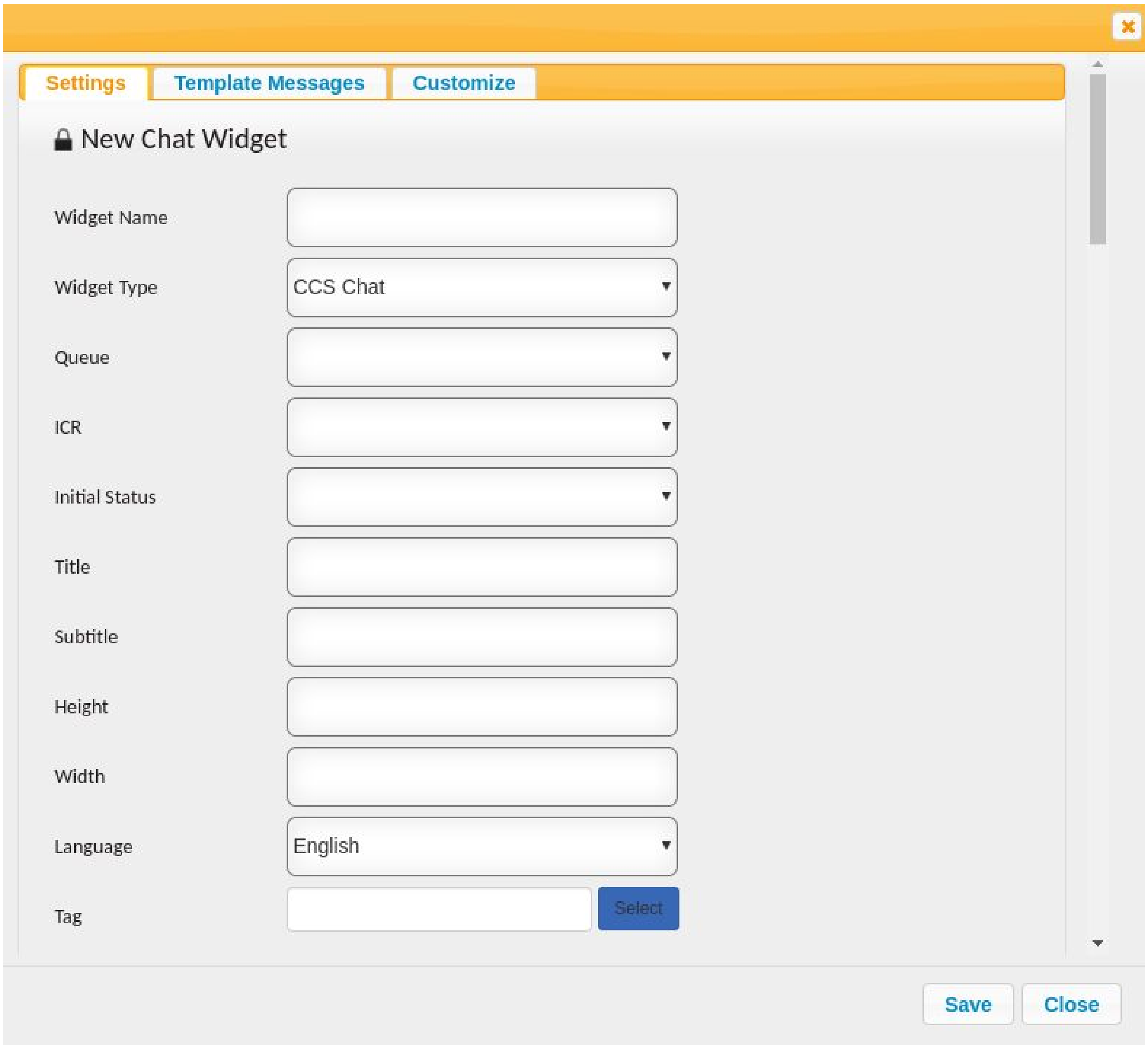
Note: To delete a supervisor, click the delete button, x, located to the right of the supervisor's name.

56. If Template Messages or customized messages are desired (See the Template Messages and Customize Sections) otherwise click the save button, Save, the created CCS chat can be viewed in the chat widget name list as shown below:



Creating a Facebook Messenger Chat Widget (Settings Tab)

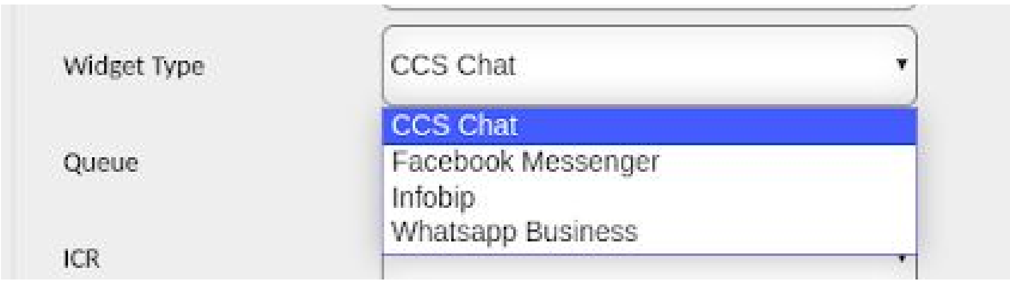
1. Click the "New" button, , located in the top right corner of the Chat Widget screen, the following pop-up screen will appear as shown below:



Note: All the input boxes are not shown in this photo; the user has to use the scroll bar on the right-hand side of the input box to view the additional input boxes.

2. Click the “Widget Name” input box, type the desired name an example is shown below:

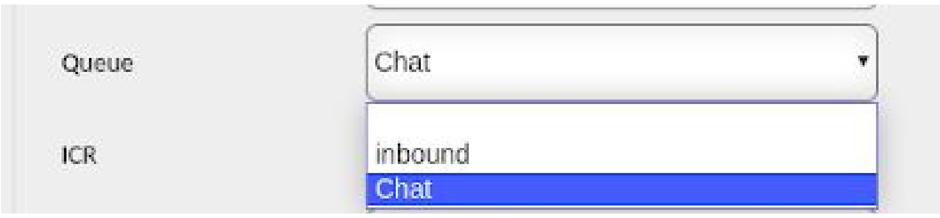
3. Click the “Widget Type” input box. A dropdown menu will appear an example is shown below:



4. Select the “Facebook Messenger” Chat widget from the dropdown list an example selection is shown below:

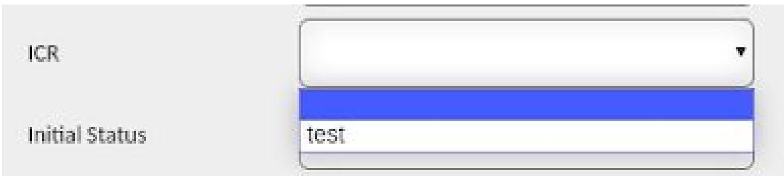
5. Click the “Verify Token” input box, type the verify token (can be any parameter desired, such as a password, company, etc. It will be used on the Facebook developer screen).
6. Click the “Page Access Token” input box, type the page access token. This token is generated automatically by Facebook. It is obtained by selecting the appropriate pages on Call Center Studio and on Facebook desired to be linked together.

7. Click the "Queue" input box, a dropdown menu will appear with available queue selections (See Queue Section to enable chat on a queue) an example is shown below:



8. Select the desired queue from the dropdown list an example selection is shown below:

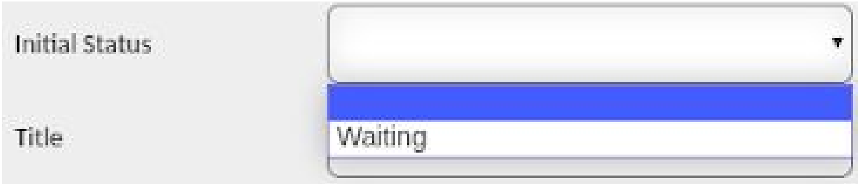
9. Select the "ICR" input box, a dropdown menu will appear with ICR selections (See the ICR section for more details) an example is shown below:



Note: Interactive Chat Response brings an IVR tree to a chat platform. It can be used in all chat channels, webchat, Facebook, WhatsApp, etc. It enables customers to self select their queues, make requests, etc.

10. Select an ICR from the dropdown list if desired an example selection is shown below:

11. Click the "Initial Status" input box a dropdown menu will appear an example is shown below:



Note: This selection can only be used when an ICR is not used. This status is used for reporting to show the initial status as "waiting," "blank," or "ICR Status."

12. Select the desired initial status or none at all from the dropdown selection, an example selection is shown below:

13. Click the "Title" input box, type a name for the Chat (Customer will be able to see) an example is shown below:

14. Click the "Subtitle" input box, type a name for the subtitle of the chat (Customer will be able to see) an example is shown below:

15. Click the "Height" input box type the desired height (Pixels) of the chat window. An example is shown below:

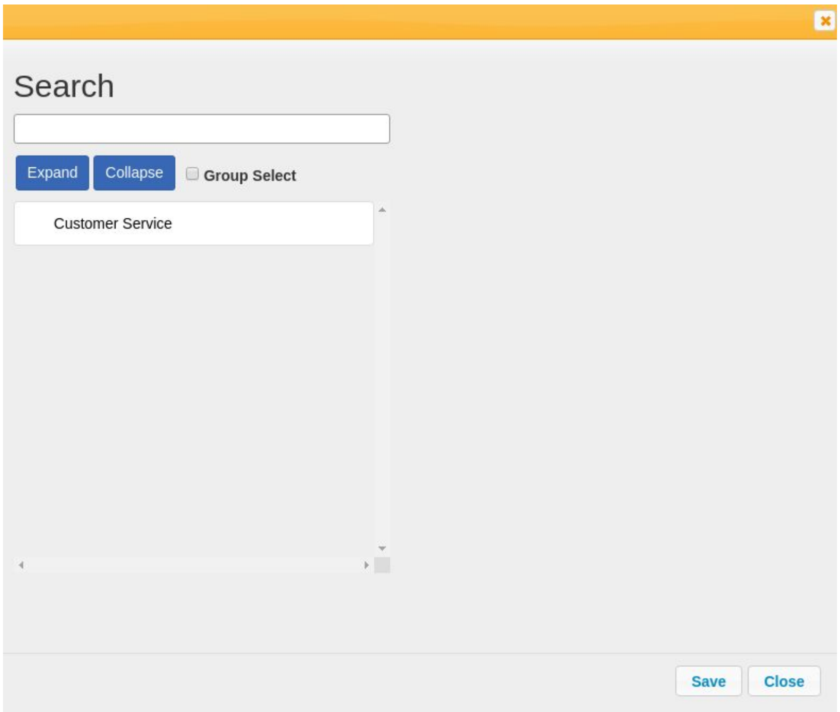
16. Click the “Width” input box type the desired width (Pixels) of the chat window. An example is shown below:

17. Click the “Language” input box, a dropdown list of added languages to the tenant will appear in the following example Turkish, and English were added to the tenant as shown below (Other languages can be added by contacting the Call Center Studio Project Manager):

18. Select the desired language from the dropdown list. An example is shown below:

19. If desired tags can be added, click the Select button, 

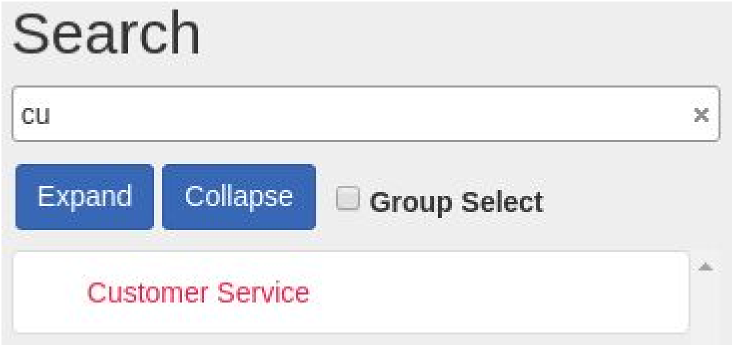
to the right of the "Tag" input box, the following pop-up window will appear:



Note: Only Tags that were made available for the chat can be viewed here (See **Tag** *Section)*

20. Search for a Tag using the "Search" input box shown below:

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



Note:

Press the Expand button, 

, to expand the selection (Used for child tags)

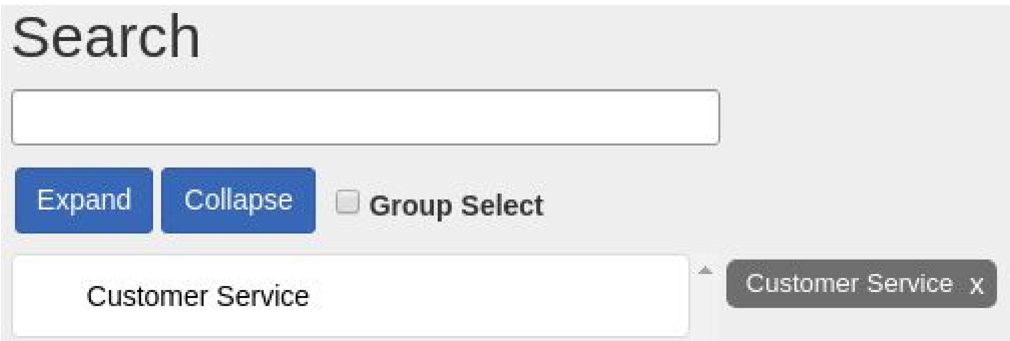
Press the Collapse button, 

, to collapse the selection (Used for child tags)

Check the Group Select Checkbox, 

, to group select tags

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:

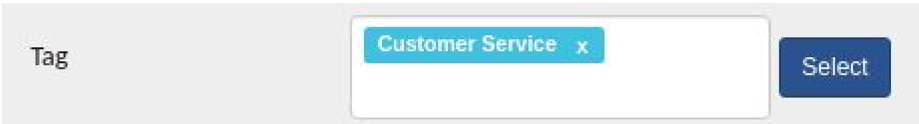


Note: To delete a Tag from the selection simply click the "X," 

, to the right of the tag name.

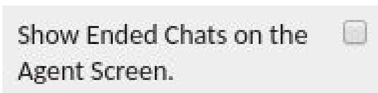
21. Once the desired Tag selections have been selected, they can be viewed to the right of the tag list box. Click the save button, 

. The "Tag" input box with an example selection is shown below:

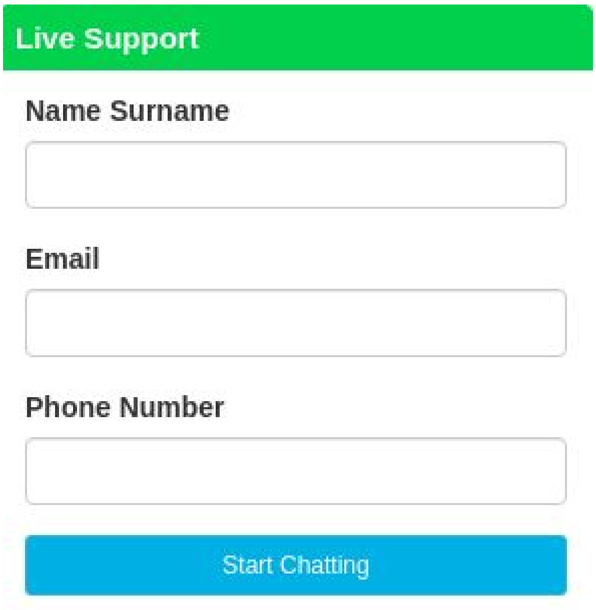


22. Click the "Support Email" type the desired support email. An example is shown below:

23. Following the Support Email input box, there are three checkbox selections outlined below select the desired checkboxes:

	Makes the email input field optional when a customer starts a chat (See example below).
	Makes the phone number input field optional when a customer starts a chat (See example below).
	Shows the ended chat on the agent screen.

Below is an example chat window: If the “Email Optional” and “Phone Optional” checkboxes are left unchecked, the visitor of the website will have to input this data before starting the chat:



24. Click the “Title Background Color” input box. A color palette will appear, as shown below:

Note: the default color code is “FFFFFF” representing the color white. All colors within the palette have unique color codes so they can be duplicated.

25. Select the desired custom color an example selection is shown below:

26. Click the “Title Text Color” input box, repeat steps 20 -21.

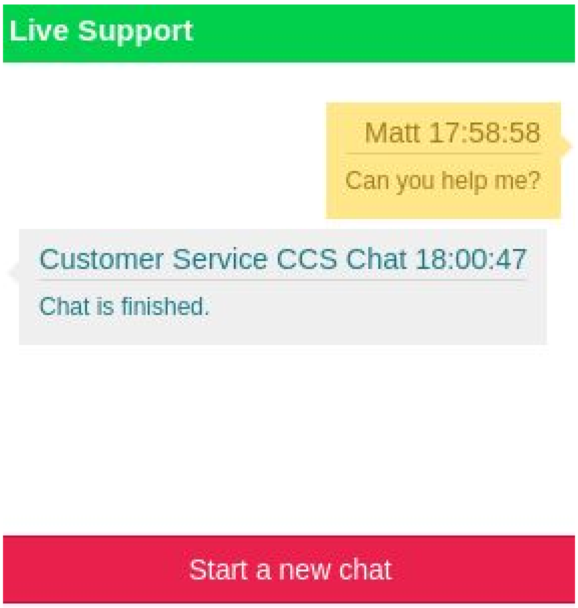
27. Click the “Start button Color” input box, repeat steps 20-21.

28. Click the “Send button Color” input box, repeat steps 20-21.

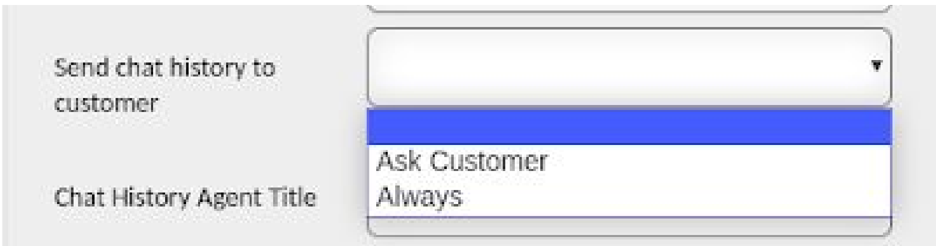
29. Click the “Logout button Color” input box, repeat steps 20-21, an example is shown below once all of the custom color selections have been completed:

30. Click the “System Nickname” input box, if desired, type a system nickname the example is shown below:

The system nickname is shown at the top of each message sent an example is shown below:



31. Click the "Send Chat History to Customer" input box, a dropdown list will appear with the following two options:

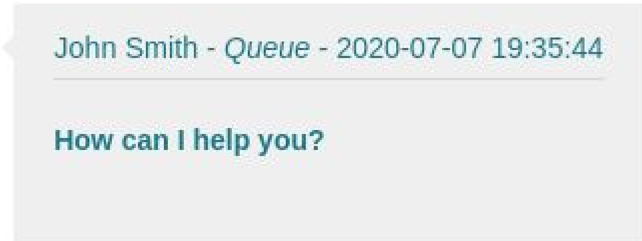


Note: the selection can also be left blank

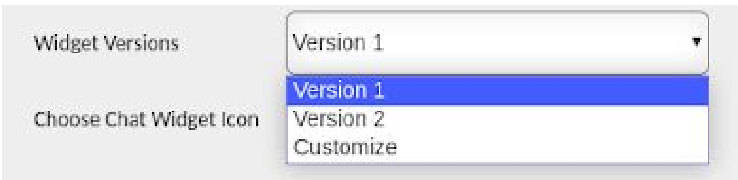
32. Select the desired option, an example selection is shown below:

33. Click "Chat History Agent Title", type a title an example is shown below:

Note: This screenshot has been taken from the Chat Record in Quality Control using the Chat History Tab, The "Chat History Agent Title" can be found in between the agent's name and the chat date as shown below:



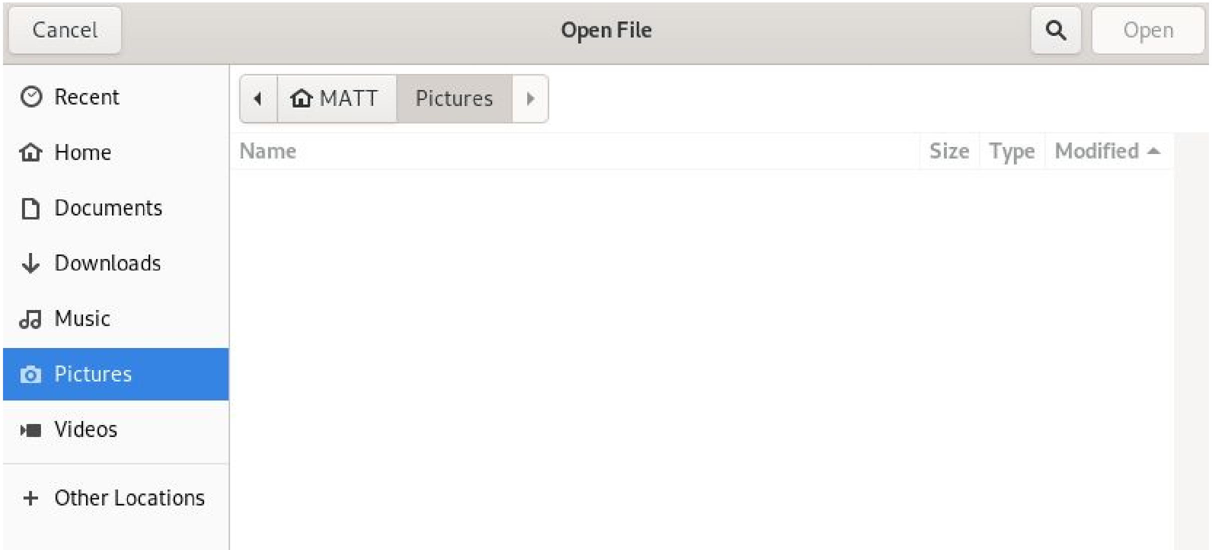
34. Click the "Widget Versions" input box, a dropdown list of created widget versions will be displayed along with a customize option an example dropdown selection is shown below:



35. Select the desired widget version an example selection is shown below:

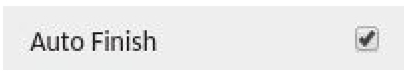
36. To the left of the title "Chose Chat Widget Icon," click the choose file button, 

, to create a custom chat icon from saved photos on the device used. A pop-up window will appear showing the saved files as shown below:



37. If a custom icon is desired, navigate to the appropriate saved location, and select the appropriate image. Once selected, the pop-up window will show the saved image. An example is shown below:

38. Check the "Auto Finish checkbox", if desired (Ends the chat after no activity after the auto finish duration), the checked "Auto Finish" checkbox is shown below:

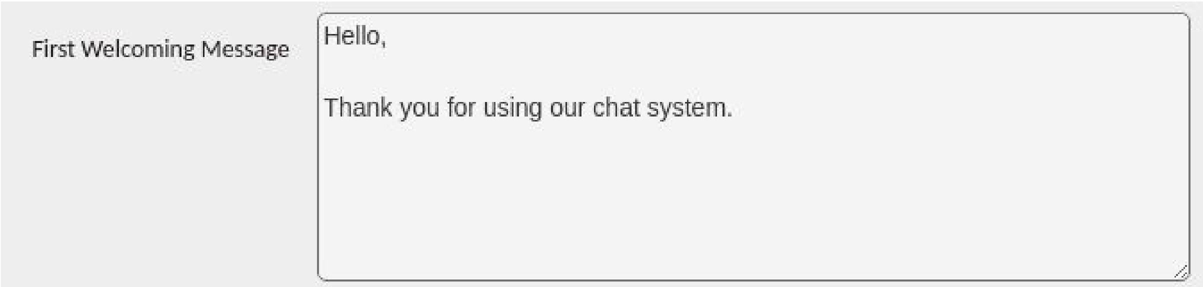


39. In the “Auto Finish Duration” input box, type the desired time frame for the chat to auto finish (only can be used if the Auto Finish checkbox is checked) an example time frame (seconds) is shown below:

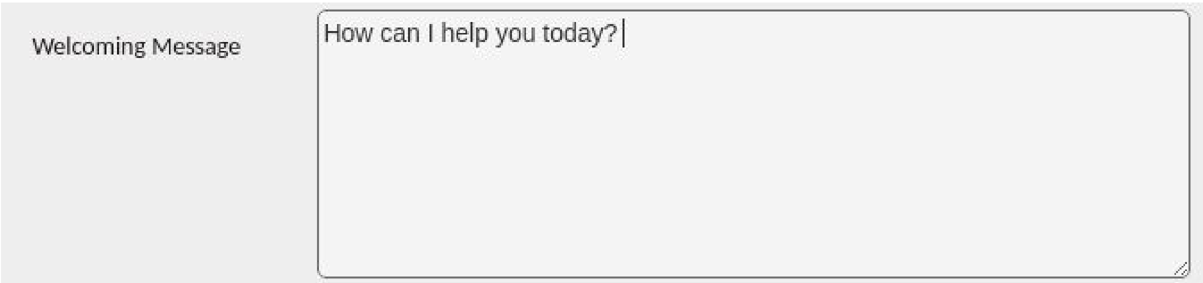
40. Click the “Action Type After Parking” input box a dropbox will appear. Select, if desired, the appropriate action after parking. The three actions are described below:

	When parking is pressed by the agent, the customer will be transferred to the queue.
	When parking is pressed, the customer will be placed on hold, agents can answer other chats, but when the customer responds, the same agent will receive the chat.
	When parking is pressed, the customer will be transferred to the ICR assigned to the chat widget.

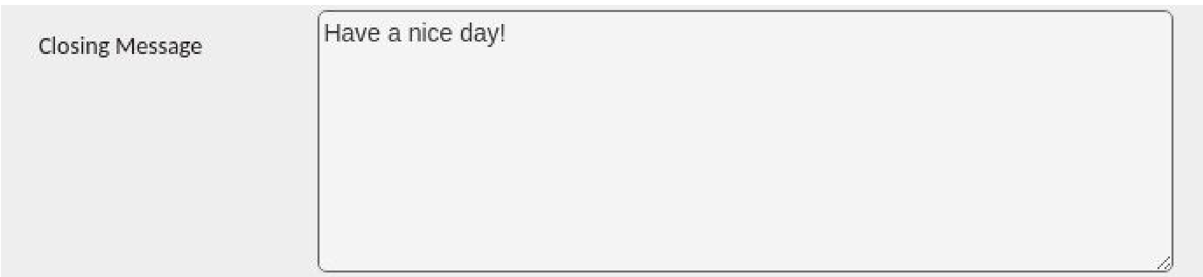
41. In the “First Welcoming Message” input box, type a first welcoming message for the chat if desired an example is shown below:



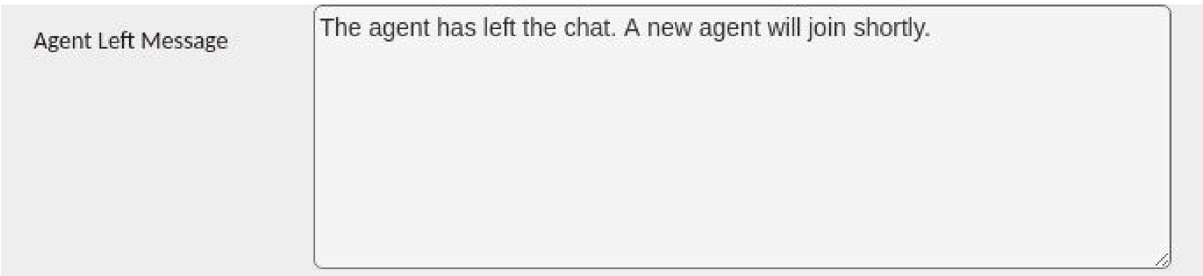
42. In the “Welcoming Message” input box, type a welcoming message for the chat if desired an example is shown below:



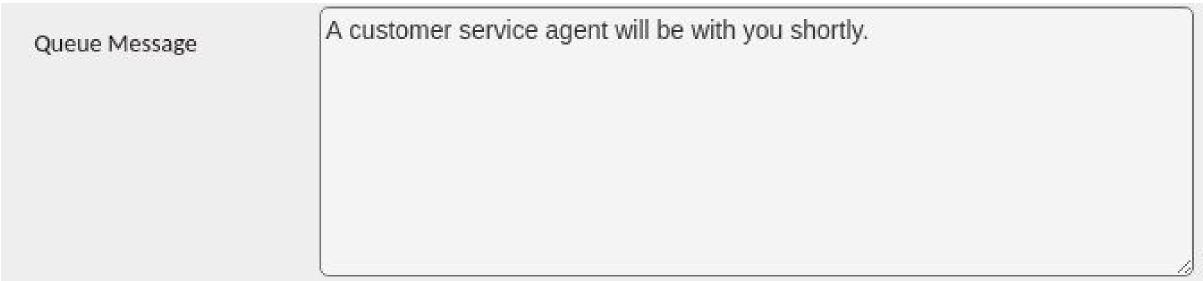
43. In the “Closing Message” input box, type a closing message for the chat if desired an example is shown below:



44. In the “Agent left Message” input box, type an Agent Left message for the chat if desired an example is shown below:

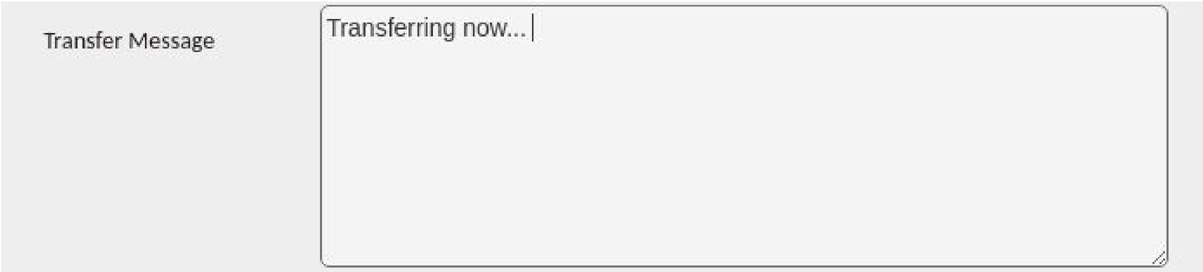


45. In the “Queue Message” input box, type a queue message for the chat, if desired. An example is shown below (Agent and customer will be able to view message once the customer is transferred to a queue):

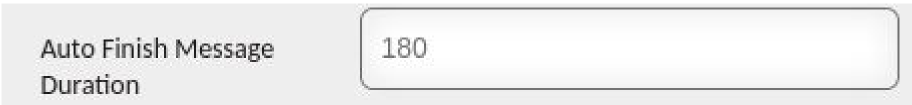


46. In the “Auto FInish Message” input box, type an auto finish message for the chat, if desired. An example is shown below (this message will be displayed after no activity during the auto finish message duration):

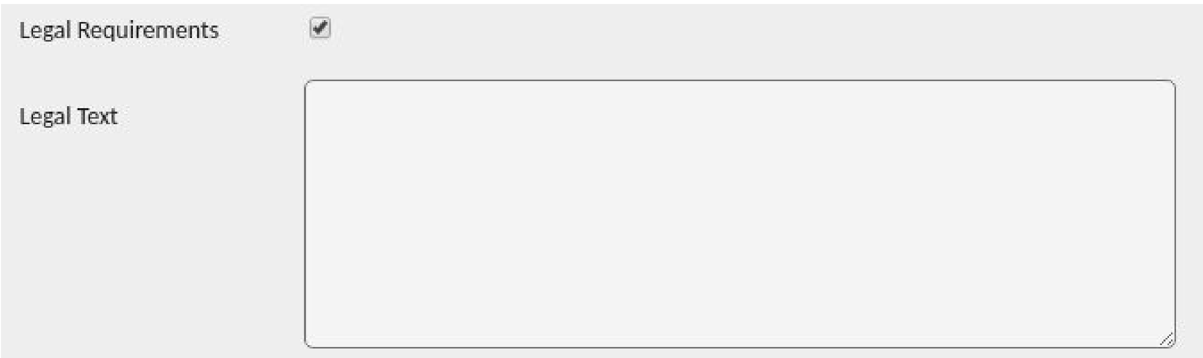
47. In the "Transfer Message" input box, type a transfer message for the chat if desired. An example is shown below:



48. In the "Auto Finish Duration" input box, type a time duration (seconds) for the chat to Auto Finish if desired an example is shown below:

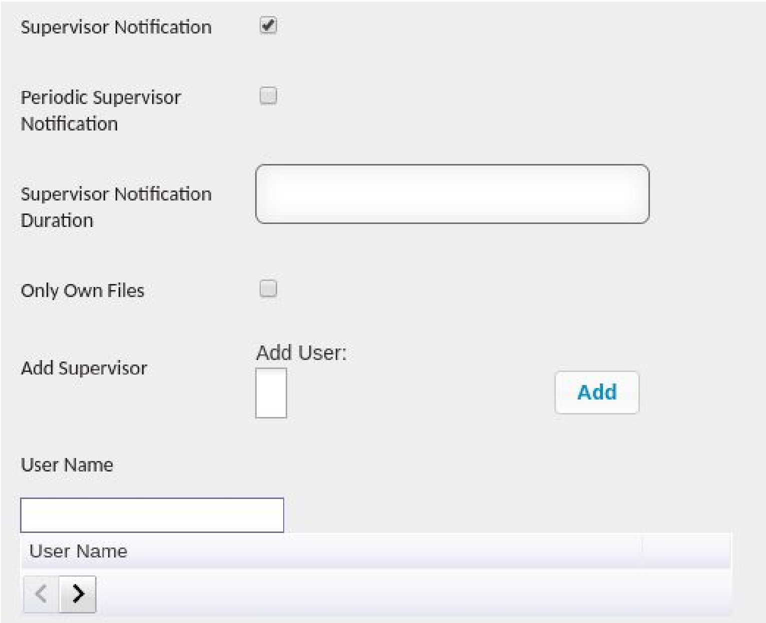


49. If a legal message is desired in the chat check the checkbox entitled "Legal Requirements," when the box is checked the following "Legal Text" input box will be displayed:



50. If desired, in the "Legal Text" input box type the desired legal text.

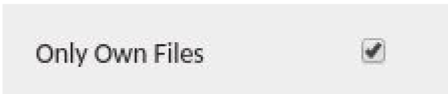
51. If supervisor notifications are desired for the chat check the checkbox entitled “Supervisor Notification,” when the box is checked, the following will be displayed:



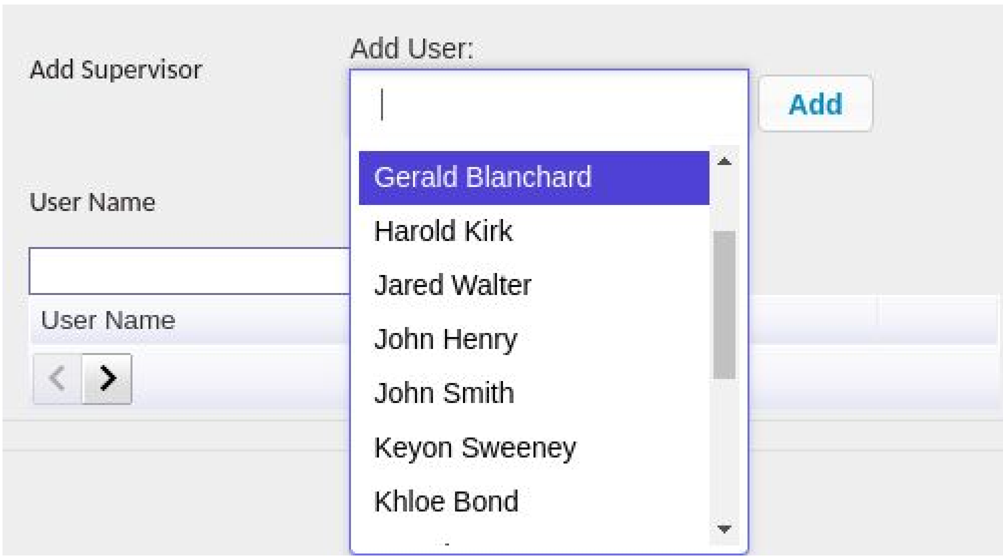
52. If periodic supervisor notification is desired, check the “Periodic Supervisor Notification” checkbox as displayed below (When selected if an agent does not respond within the Supervisor Notification Duration to a customer’s chat, the supervisor will receive a notification):

53. Click the "Supervisor Notification Duration" input box, type the desired supervisor notification duration (seconds) an example is displayed below:

54. Check the "Only Own Files" checkbox. An example is shown below (When selected agents cannot upload files from their desktop to send to a customer, they can only use the template messages created in the tenant with attachments):



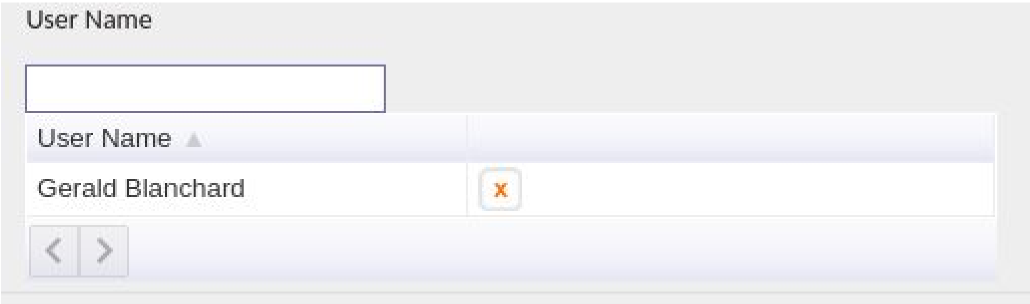
55. Click the "Add Supervisor" input box and start typing the name of the supervisor. A dropdown list will appear to facilitate in choosing a supervisor as shown below:



56. Select the desired Supervisor and click the add button, 

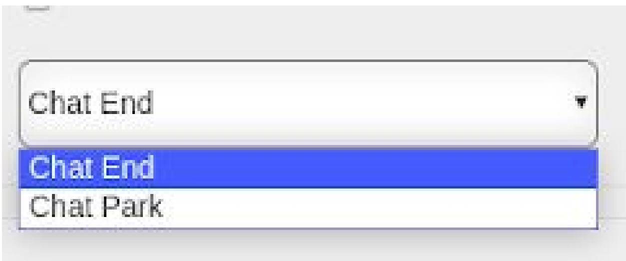
.

57. The supervisor's name will appear in the "User Name" field an image of this field is shown below:



Note: To delete a supervisor, click the delete button, , located to the right of the supervisor's name.

58. Click the "Finish Button Action Type" (The small close button in the upper right corner of the chat screen) input box. A dropdown list will appear with two selections described below choose the desired selection or none at all:

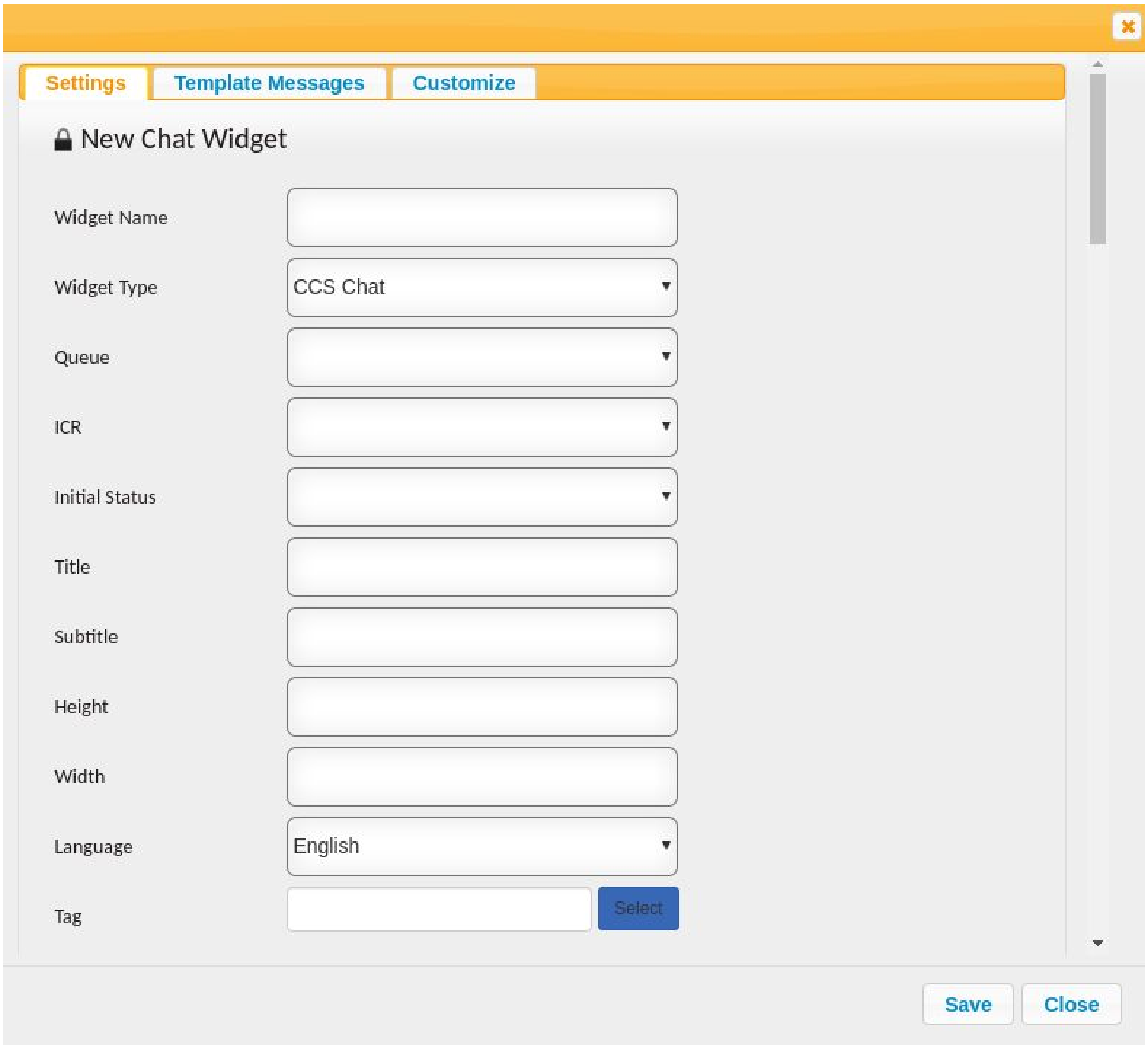


Chat End	Ends the chat.
Chat Park	Parks the chat. If the client's customer responds to the chat within 24 hours, the same agent can return to the chat and also review the prior conversation.

59. If Template Messages or customized messages are desired (See the Template Messages and Customize Sections) otherwise click the save button, Save , the created Facebook Messenger chat can be viewed in the chat widget name list as shown below:

Creating an Infobip Widget (Settings Tab)

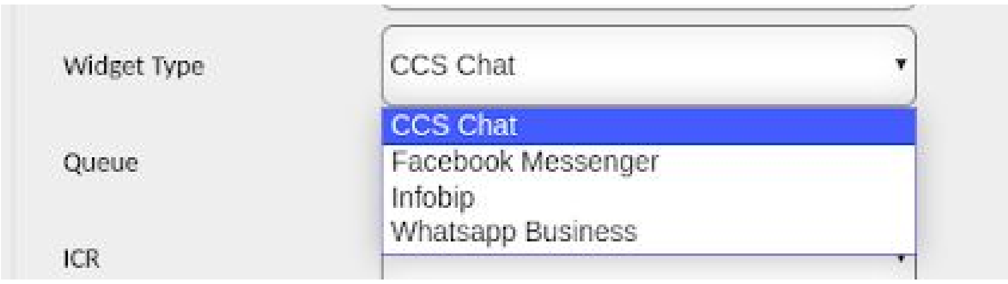
1. Click the New button, , located in the top right corner of the Chat Widget screen, the following pop-up screen will appear as shown below:



Note: All the input boxes are not shown in this photo; the user has to use the scroll bar on the right-hand side of the input box to view the additional input boxes.

2. Click the “Widget Name” input box, type the desired name an example is shown below:

3. Click the “Widget Type” input box. A dropdown menu will appear an example is shown below:



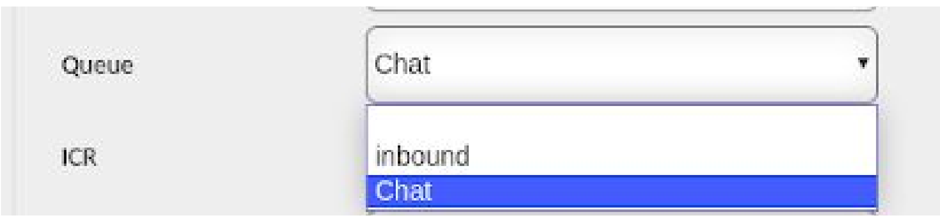
4. Select the “Infobip” widget type from the dropdown list an example selection is shown below:

5. Click the “WhatsApp Username” input box, type the WhatsApp (Infobip) username an example is shown below:

6. Click the “WhatsApp Password” input box, type the WhatsApp (infobip) password an example is shown below:

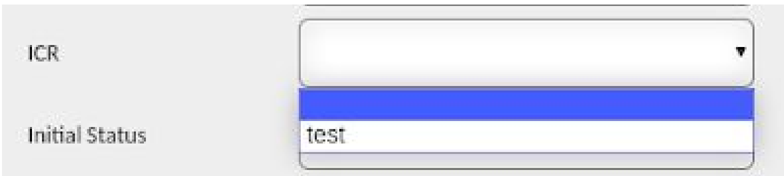
7. After completing steps 5 and 6, a basic authorization token can be generated in the "Whatsapp Basic Authorization" input box by clicking the show button, .
8. After completing step 7, a WhatsApp authorization token can be generated in the "Whatsapp App Authorization" box. WhatsApp basic Authorization is password dependent, whereas WhatsApp App Authorization is not. For this reason, WhatsApp App authorization is preferred over basic authorization. This authorization code will then be used in the Infobip API.
9. Click the "WhatsApp Phone Number" input box, type the WhatsApp phone number. The input box is shown below:

10. Click the "WhatsApp Scenario Key" input box, type the WhatsApp Scenario Key provided by the Infobip Company.
11. Click the "WhatsApp Base URL" input box, type the desired company Infobip URL given when the Infobip account was created for example SmithCo.api.infobip.com.
12. Click the "WhatsApp Account Key" input box, type the WhatsApp account key from the Infobip account.
13. Click the "Queue" input box, a dropdown menu will appear with available queue selections (See Queue Section to enable chat on a queue) an example is shown below:



14. Select the desired queue from the dropdown list an example selection is shown below:

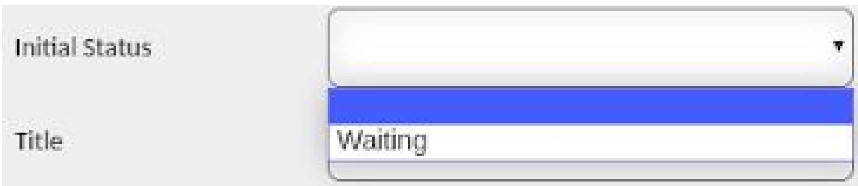
15. Select the "ICR" input box, a dropdown menu will appear with ICR selections (See the ICR section for more details) an example is shown below:



Note: Interactive Chat Response brings an IVR tree to a chat platform. It can be used in all chat channels, webchat, Facebook, WhatsApp, etc. It enables customers to self select their queues, make requests, etc.

16. Select an ICR from the dropdown list, if desired. An example selection is shown below:

17. Click the "Initial Status" input box a dropdown menu will appear an example is shown below:



Note: This selection can only be used when an ICR is not used. This status is used for reporting to show the initial status as "waiting," "blank," or "ICR Status."

18. Select the desired initial status or none at all from the dropdown selection, an example selection is shown below:

19. Click the “Title” input box, type a name for the chat (customer will be able to see) an example is shown below:

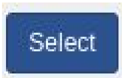
20. Click the “Subtitle” input box, type a name for the subtitle of the chat (customer will be able to see) an example is shown below:

21. Click the “Height” input box type the desired height (Pixels) of the chat window. An example is shown below:

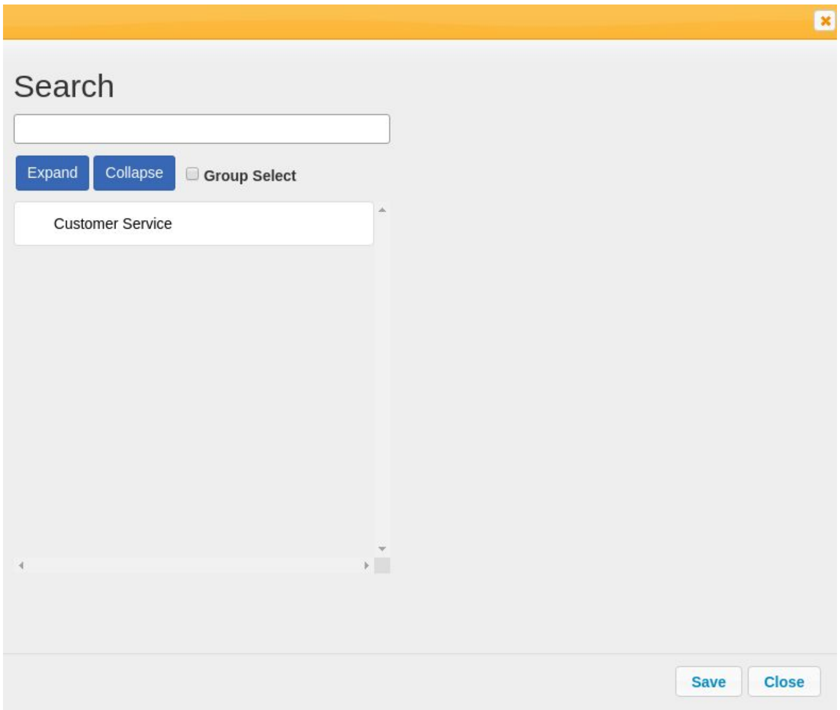
22. Click the “Width” input box type the desired width (Pixels) of the chat window. An example is shown below:

23. Click the “Language” input box, a dropdown list of added languages to the tenant will appear in the following example Turkish, and English were added to the tenant as shown below (Other languages can be added by contacting the Call Center Studio Project Manager):

24. Select the desired language from the dropdown list. An example is shown below:

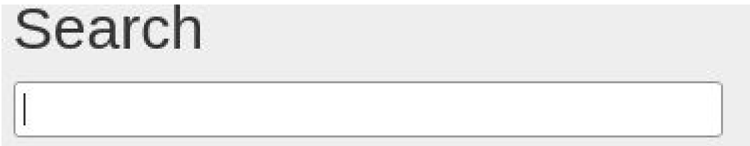
25. Click the Select button, 

to the right of the “Tag” input box. The following pop-up window will appear:

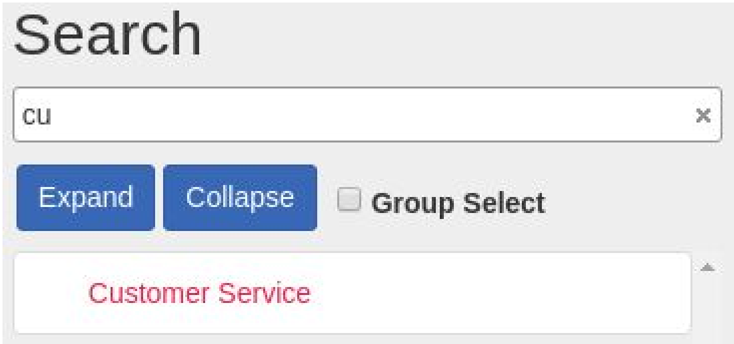


Note: Only Tags that were made available for the chat can be viewed here (See **Tag** *Section)*

26. Search for a Tag using the “Search” input box shown below:



Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



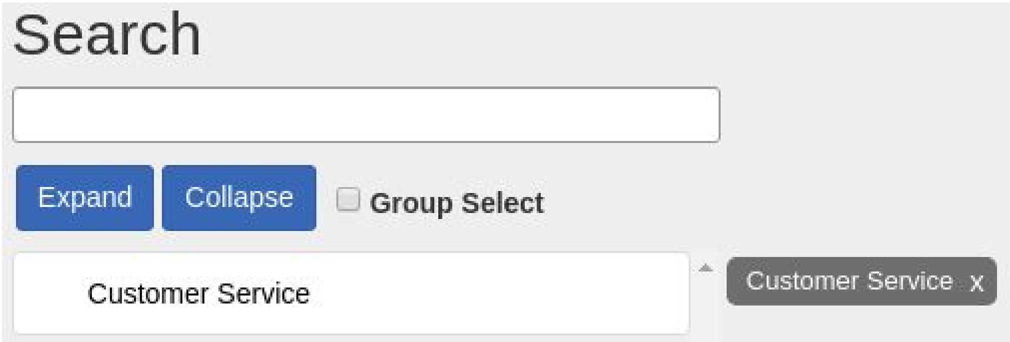
Note:

Press the Expand button, Expand*, to expand the selection (Used for child tags)*

Press the Collapse button, Collapse*, to collapse the selection (Used for child tags)*

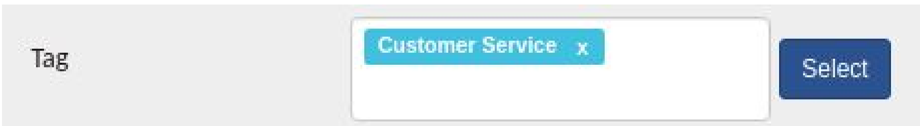
Check the Group Select Checkbox, Group Select *, to group select tags.*

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the "X," X, to the right of the tag name.

27. Once the desired Tag selections have been selected, they can be viewed to the right of the tag list box click the save button, Save, the "Tag" input box with an example selection is shown below:

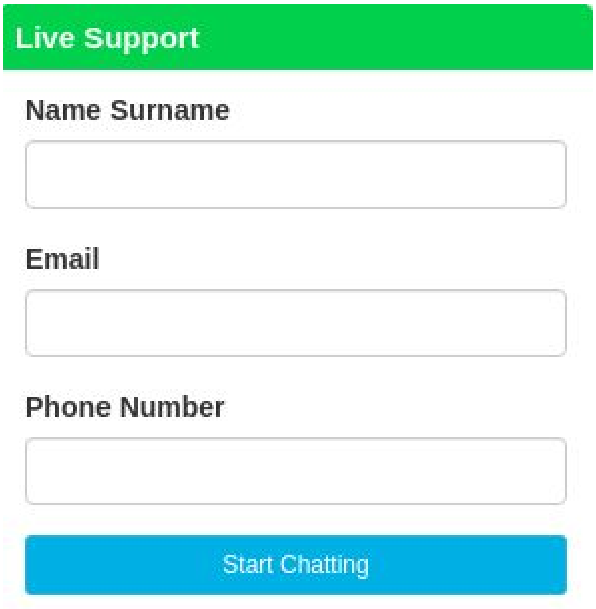


28. Click the "Support Email" type the desired support email. An example is shown below:

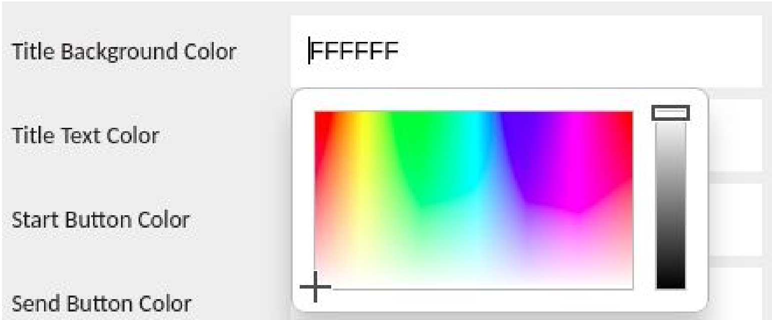
29. Following the Support Email input box, the are three checkbox selections outlined below select the desired checkboxes:

Email Optional ☐	Makes the email input field optional for the customer to input.
Phone Optional ☐	Makes the phone input field optional for the customer to input.
Show Ended Chats on the Agent Screen. ☐	Shows that the chat ended on the agent's screen.

Below is an example chat window: If the "Email Optional" and "Phone Optional" checkboxes are left unchecked, the visitor of the website will have to input this data before starting the chat:



30. Click the “Title Background Color” input box. A color palette will appear, as shown below:



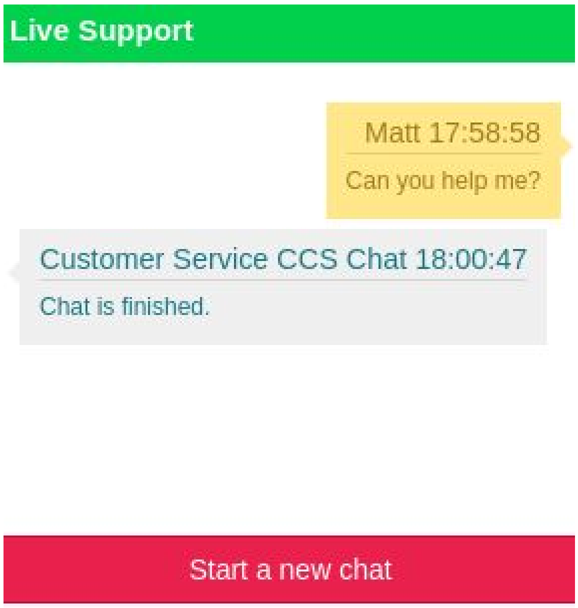
Note: the default color code is “FFFFFF” representing the color white. All colors within the palette have unique color codes so they can be duplicated.

31. Select the desired custom color an example selection is shown below:

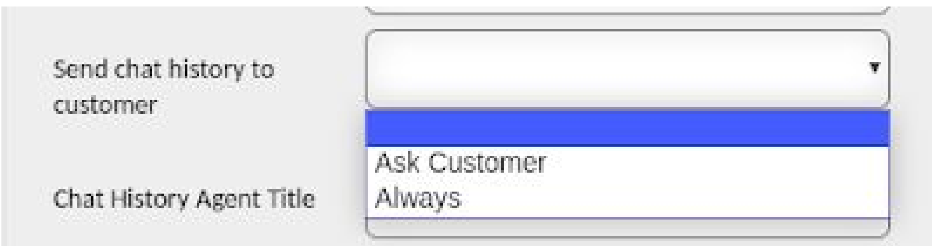
32. Click the “Title Text Color” input box, repeat steps 20 -21.
33. Click the “Start button Color” input box, repeat steps 20-21.
34. Click the “Send button Color” input box, repeat steps 20-21.
35. Click the “Logout button Color” input box, repeat steps 20-21, an example is shown below once all of the custom color selections have been completed:

36. Click the “System Nickname” Input box, if desired, type a system nickname the example is shown below:

The system nickname is shown at the top of each message sent an example is shown below:



37. Click the “Send Chat History to Customer” input box, a dropdown list will appear with the following two options:

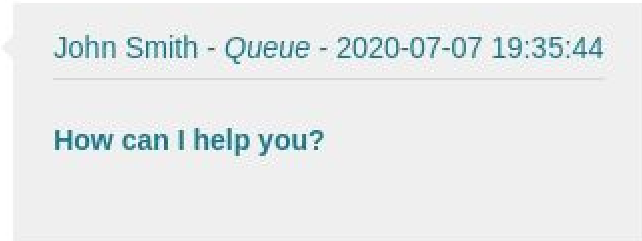


Note: the selection can also be left blank.

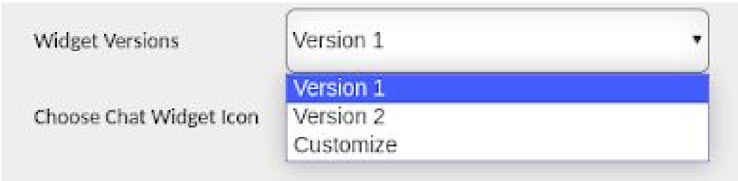
38. Select the desired option, an example selection is shown below:

39. Click “Chat History Agent Title”, type a title. An example is shown below:

Note: This screenshot has been taken from the Chat Record in Quality Control from the Chat History Tab, The “Chat History Agent Title” can be found in between the agent’s name and the chat date as shown below:



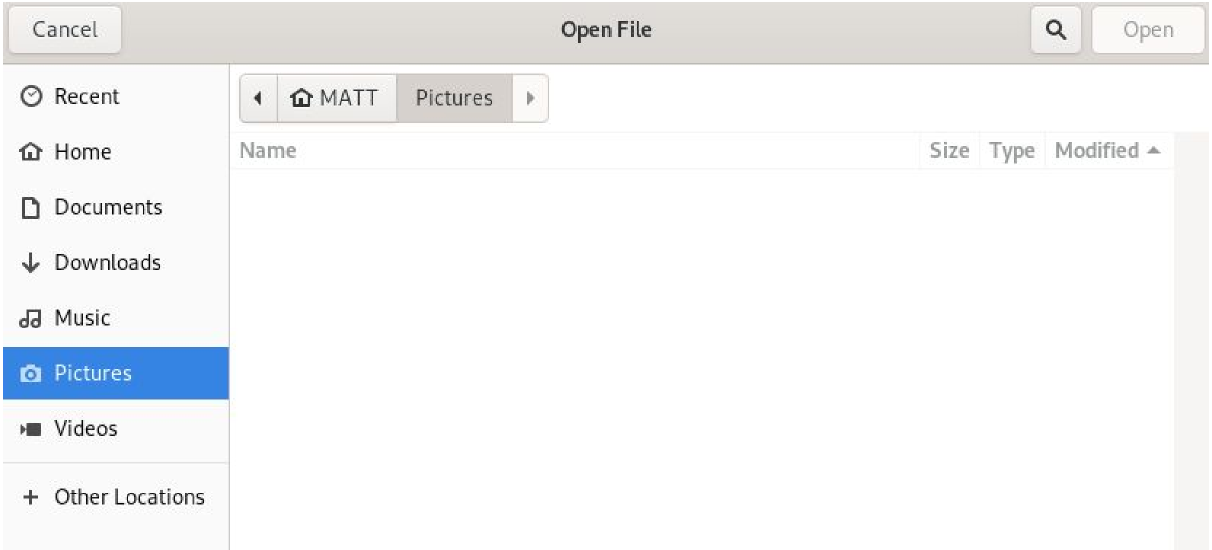
40. Click the “Widget Versions” input box, a dropdown list of created widget versions will be displayed along with a customize option an example dropdown selection is shown below:



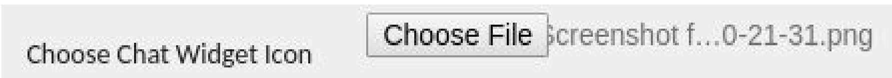
Version 1	Shows the chat window on the customer’s screen with square corners. (Used for webchat aka CCS Chat)
Version 2	Shows the chat window on the customer’s screen with rounded corners. (Used for webchat aka CCS Chat)
Customize	Shows the chat window on the customer’s screen with rounded corners, and a custom logo can be added to the chat window as well. (Used for webchat aka CCS Chat)

41. Select the desired widget version an example selection is shown below:

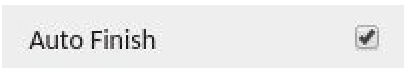
42. To the left of the title “Chose Chat Widget Icon,” (Used exclusively for creating an icon for the webchat (aka CCS Chat) files can be uploaded in .png, .jpeg, .jpg) click the choose file button, Choose File , to create a custom chat icon from saved photos on the device. A pop-up window will appear showing the saved files as shown below:



43. If a custom icon is desired, navigate to the appropriate saved location and select the appropriate image, once selected the pop-up window will show the saved image, an example is shown below:



44. Check “Auto Finish” checkbox, if desired to auto finish the chat, the checked Auto Finish checkbox is shown below:



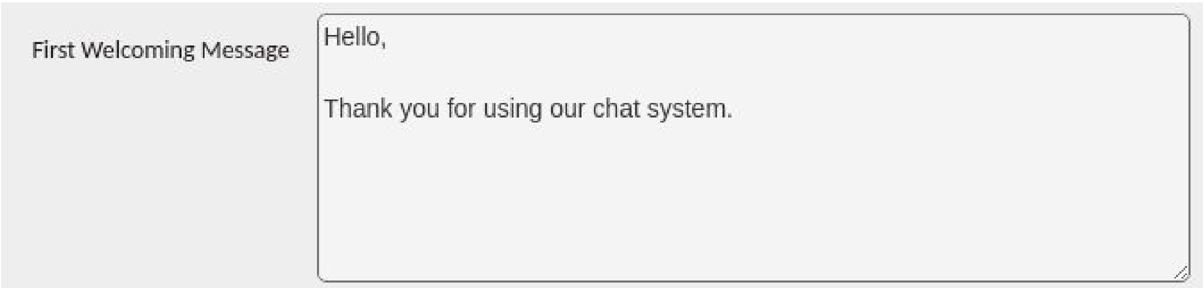
45. In the “Auto Finish Duration” input box type the desired time frame for the chat to auto finish (only can be used if the Auto Finish checkbox is checked) an example time frame is shown below:

Auto Finish Duration 180

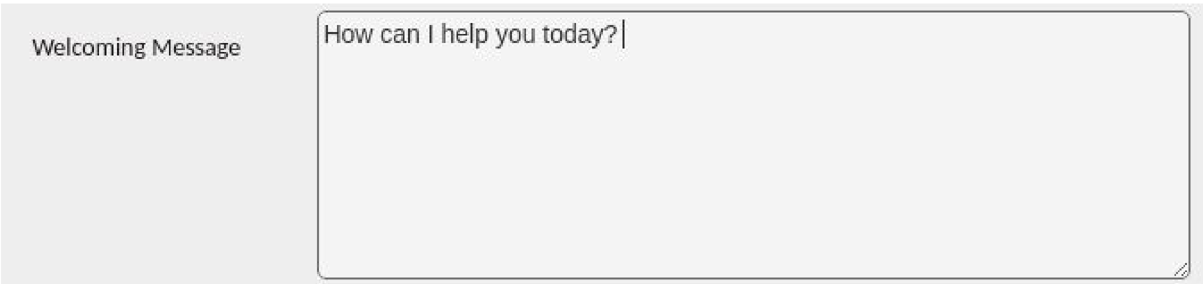
46. Click the “Action Type After Parking” input box a dropbox will appear. Select, if desired, the appropriate action after parking. The three actions are described below:

Go to Queue.	When parking is pressed by the agent, the customer will be transferred to the queue.
Go to Queue and reserve the parking agent.	When parking is pressed, the customer will be placed on hold. Agents can answer other chats, but when the customer responds, the same agent will receive the chat.
Start ICR.	When parking is pressed, the customer will be transferred to the ICR assigned to the chat widget.

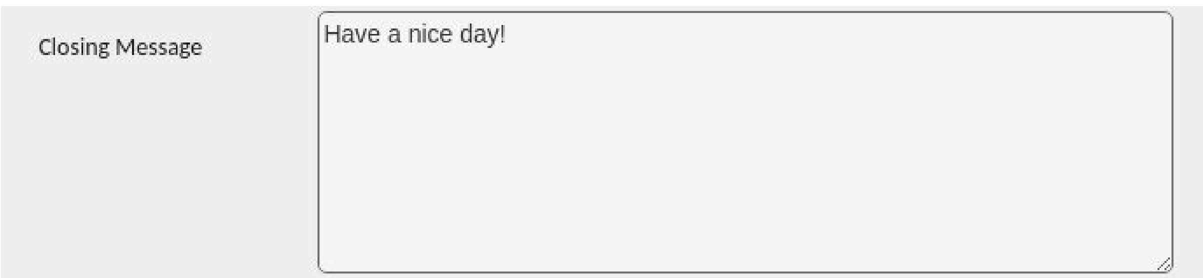
47. In the “First Welcoming Message” input box, type a first welcoming message for the chat if desired an example is shown below:



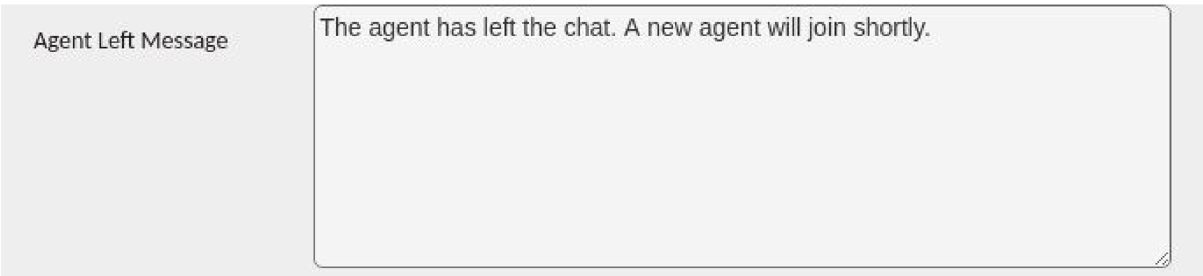
48. In the “Welcoming Message” input box, type a welcoming message for the chat if desired an example is shown below:



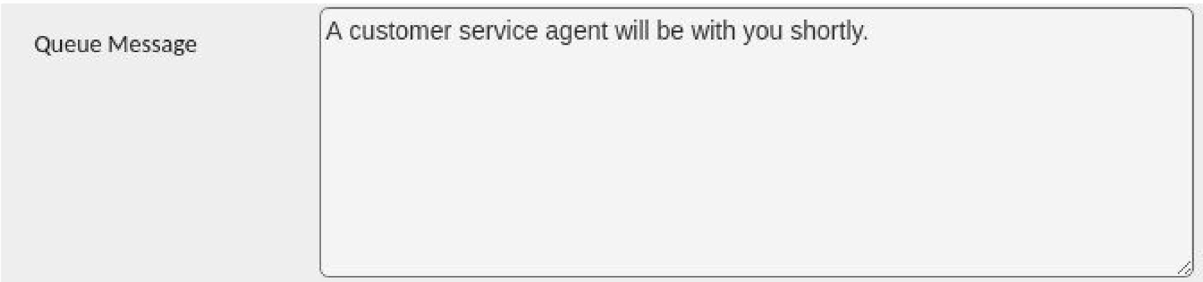
49. In the “Closing Message” input box, type a closing message for the chat if desired an example is shown below:



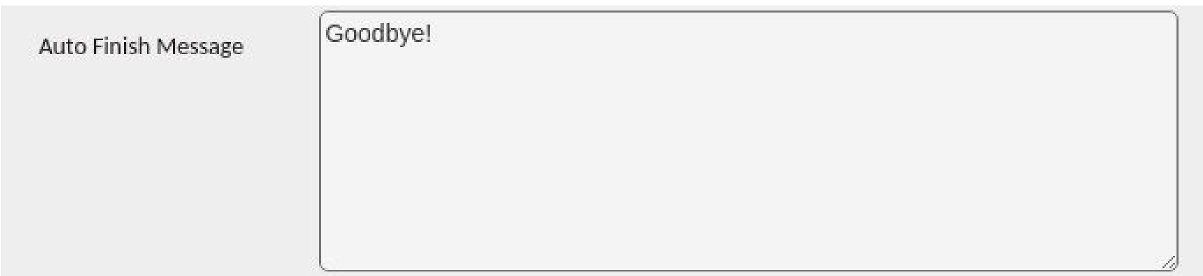
50. In the "Agent left Message" input box, type an agent left message for the chat if desired an example is shown below:



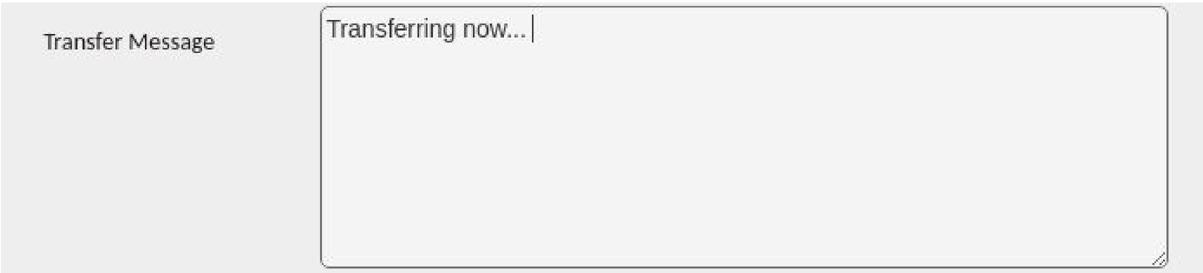
51. In the "Queue Message" input box, type a queue message for the chat if desired an example is shown below:



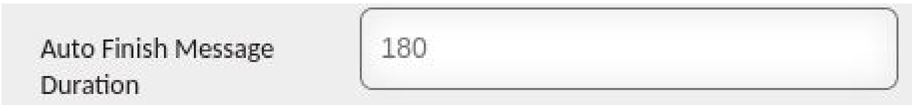
52. In the "Auto Finish Message" input box, type an auto finish message for the chat if desired an example is shown below:



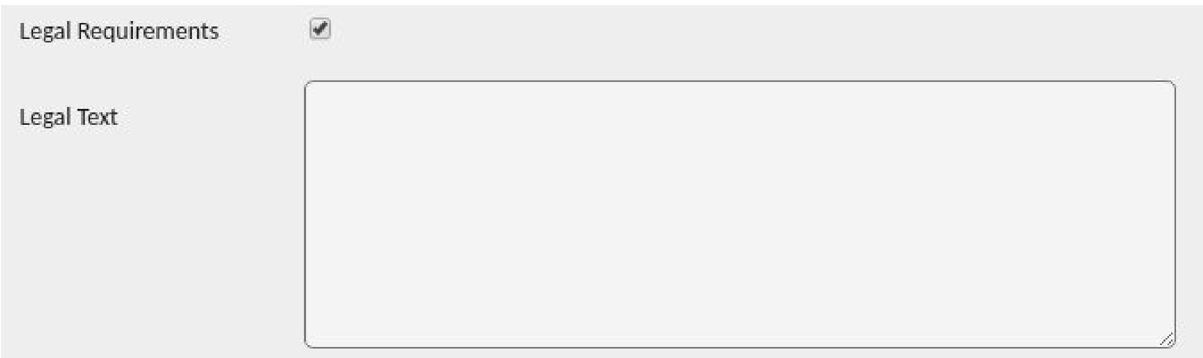
53. In the "Transfer Message" input box, type a transfer message for the chat if desired an example is shown below:



54. In the "Auto Finish Duration" input box, type a time duration for the chat to Auto Finish, if desired. An example is shown below:

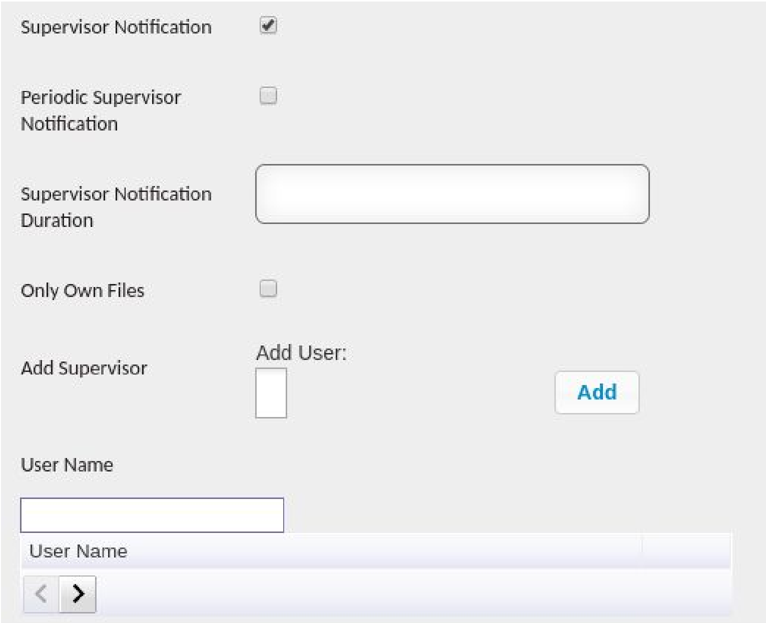


55. If a legal message is desired in the chat check the checkbox entitled "Legal Requirements," when the box is checked the following "Legal Text" input box will be displayed:



56. If desired in the "Legal Text" input box type the desired legal text.

57. If supervisor notifications are desired for the chat check the checkbox entitled “Supervisor Notification,” when the box is checked the following will be displayed:

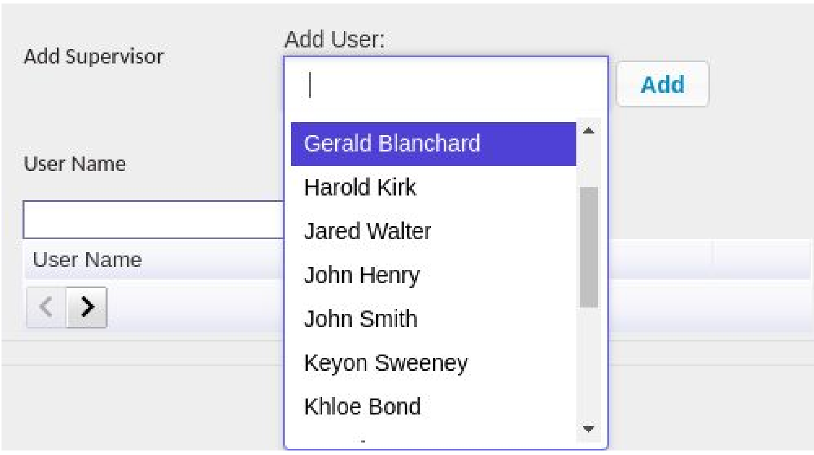


58. If periodic supervisor notification is desired, check the “Periodic Supervisor Notification” checkbox as displayed below (When selected if an agent does not respond within the Supervisor Notification Duration to a customer’s chat, the supervisor will receive a notification):

59. Click the “Supervisor Notification Duration” input box, type the desired supervisor notification duration an example is displayed below:

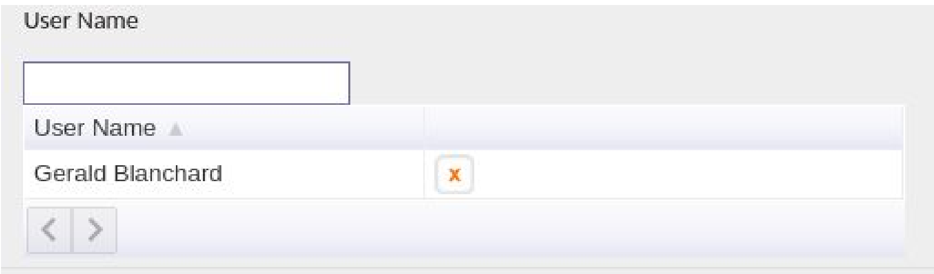
60. Check the "Only Own Files" checkbox, an example is shown below (When selected agents cannot upload files from there desktop to send to a customer, they can only use the template messages created in the tenant with attachments):

61. Click the "Add Supervisor" input box and start typing the name of the supervisor to add a dropdown list will appear to facilitate in choosing a supervisor as shown below:



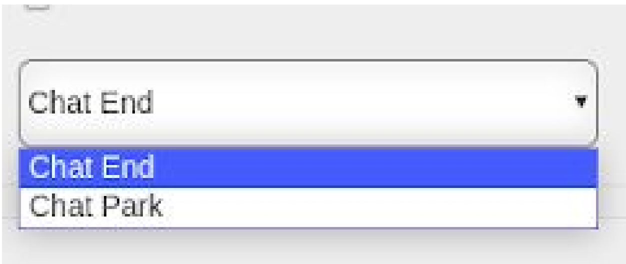
62. Select the desired Supervisor and click the add button,  .

63. The supervisor's name will appear in the "User Name" field an image of this field is shown below:



Note: To delete a supervisor, click the delete button,  *, located to the right of the supervisor's name.*

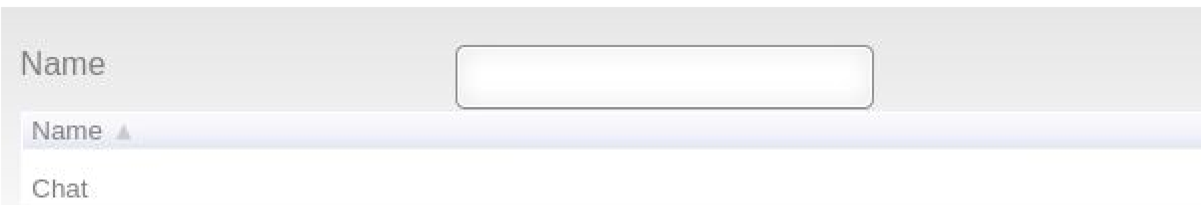
64. Click the "Finish Button Action Type" input box a dropdown list will appear with two selections described below choose the desired selection or none at all:



Chat End	Ends the chat.
Chat Park	Parks the chat, which means if the client's customer responds to the chat again within 24 hours. The same agent can respond to the chat and also review the prior conversation.

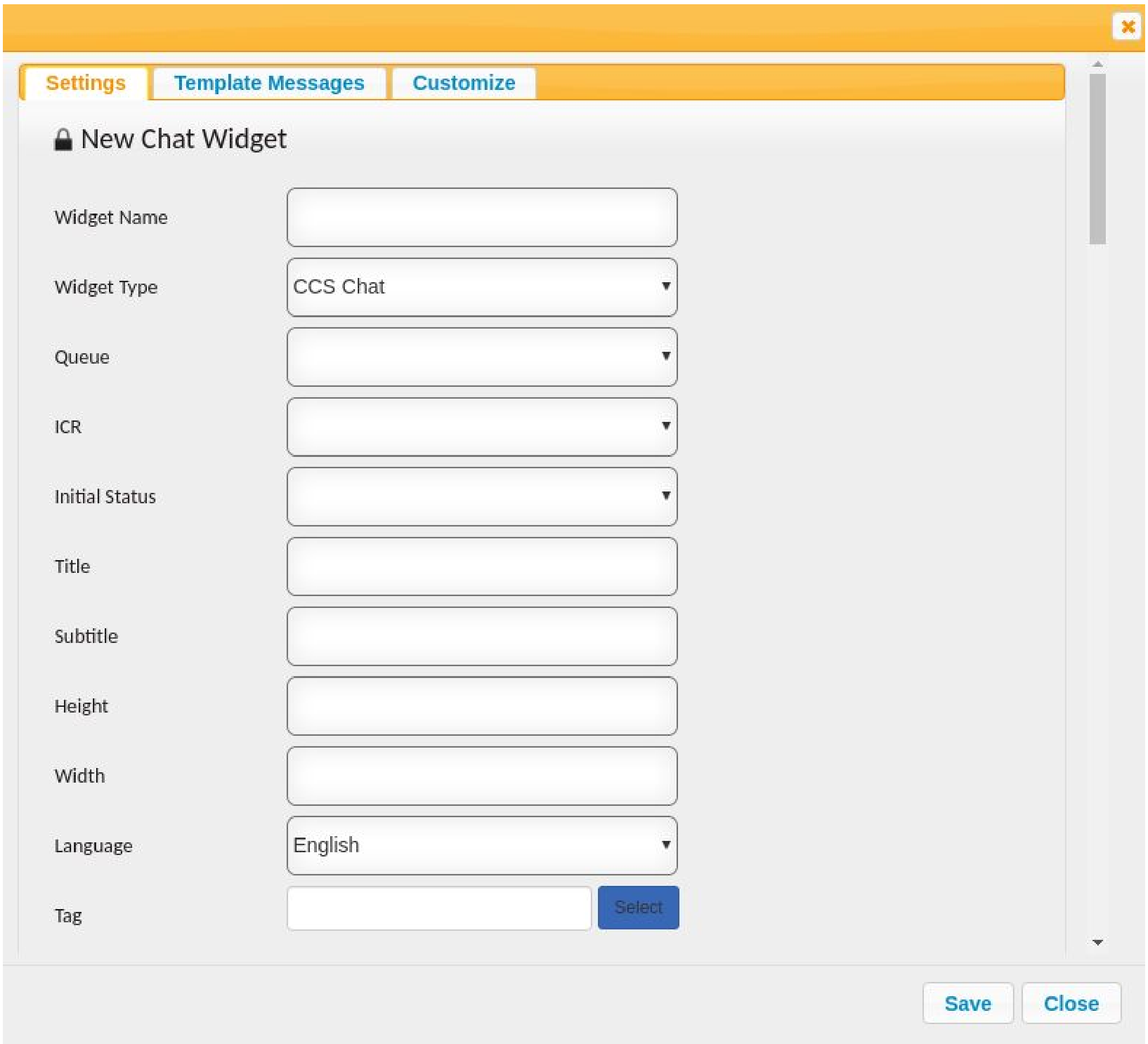
65. If Template Messages or customized messages are desired (See the Template Messages and Customize Sections) otherwise click the save button, 

, the created CCS chat can be viewed in the chat widget name list as shown below:



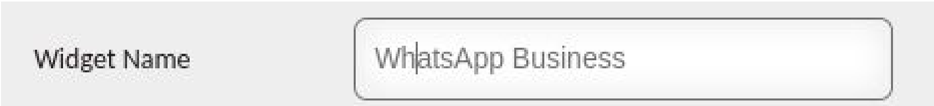
Creating a WhatsApp Business Widget (Settings Tab)

1. Click the “New” button, ➕, located in the top right corner of the Chat Widget screen, the following pop-up screen will appear as shown below:

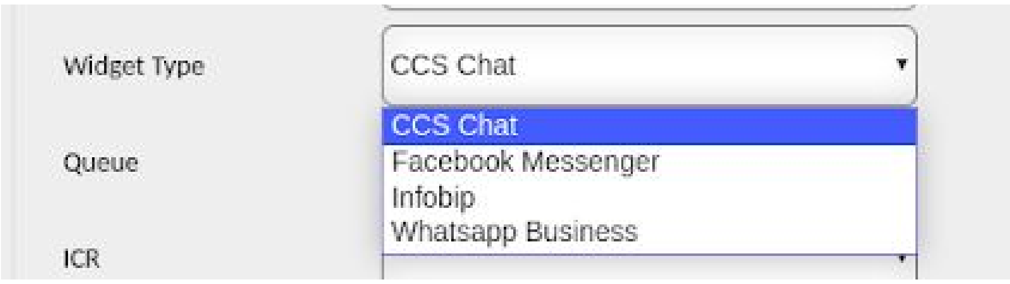


Note: All the input boxes are not shown in this photo; the user has to use the scroll bar on the right hand side of the input box to view the additional input boxes.

2. Click the “Widget Name” input box, type the desired name an example is shown below:



3. Click the “Widget Type” input box. A dropdown menu will appear an example is shown below:

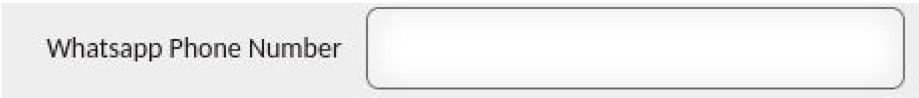


4. Select the “Whatsapp Business” from the dropdown list an example selection is shown below:

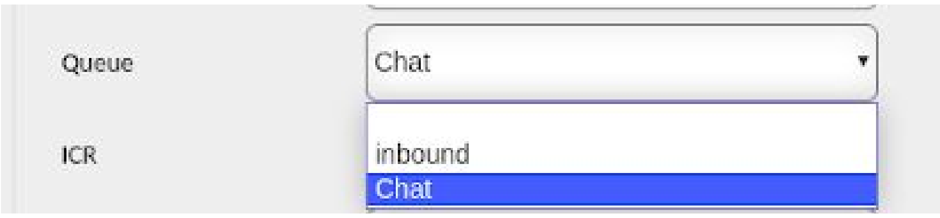
5. Click the “WA Business Username” input box, type the WA Business Username an example is shown below:

6. Click the “WA Business Password” input box, type the WA Business Password an example is shown below:

7. Click the "Admin Auth Token" input box, type the Admin Auth Token (Provided by the Call Center Studio Team) After seven days, the token changes automatically. It is essential for using the WhatsApp Business API.
8. Click the "WA Business Endpoint" input box, type the server address provided by the Call Center Studio Team.
9. Click the "WhatsApp Phone Number" input box, type the WhatsApp Phone Number the input box is shown below:

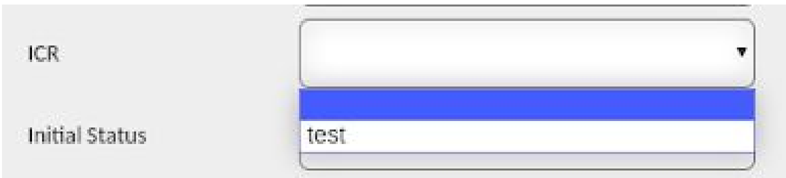


10. Click the "Queue" input box, a dropdown menu will appear with available queue selections (See Queue Section to enable chat on a queue) an example is shown below:



11. Select the desired queue from the dropdown list an example selection is shown below:

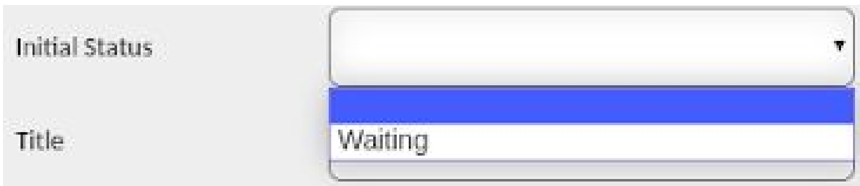
12. Select the "ICR" input box, a dropdown menu will appear with ICR selections (See the ICR section for more details) an example is shown below:



Note: Interactive Chat Response brings an IVR tree to a chat platform. It can be used in all chat channels, web chat, Facebook, whatsapp, etc. It enables customers to self select their queues, make requests, etc.

13. Select an ICR from the dropdown list if desired an example selection is shown below:

14. Click the "Initial Status" input box a dropdown menu will appear an example is shown below:



Note: This selection can only be used when an ICR is not used. This status is used for reporting to show the initial status as "waiting," "blank," or "ICR Status."

15. Select the desired initial status or none at all from the dropdown selection, an example selection is shown below:

16. Click the “Title” input box, type a name for the Chat (Customer will be able to see) an example is shown below:

17. Click the “Subtitle” input box, type a name for the subtitle of the chat (Customer will be able to see) an example is shown below:

18. Click the “Height” input box type the desired height (Pixels) of the chat window. An example is shown below:

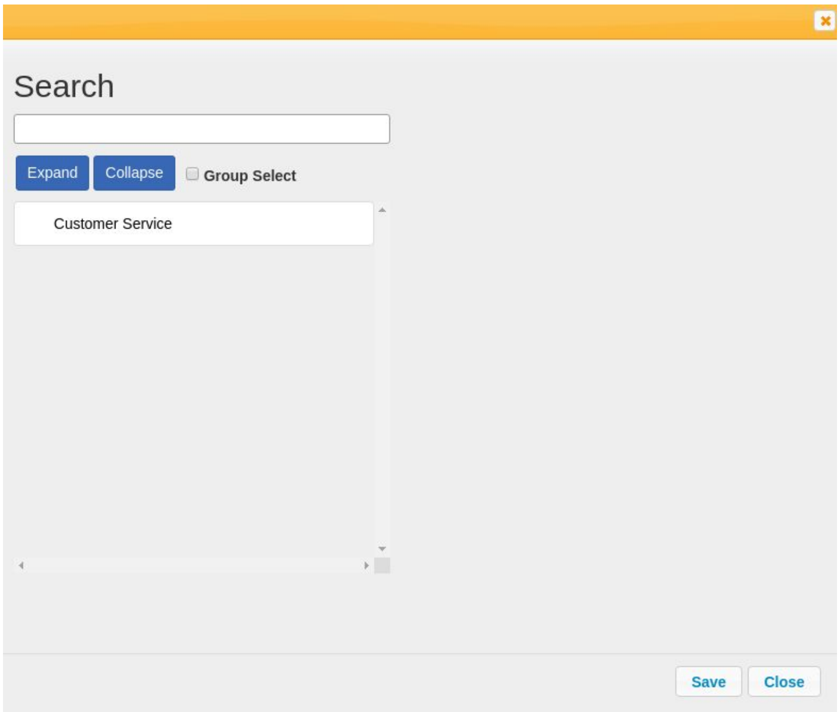
19. Click the “Width” input box type the desired width (Pixels) of the chat window. An example is shown below:

20. Click the “Language” input box, a dropdown list of added languages to the tenant will appear in the following example Turkish, and English were added to the tenant as shown below (Other languages can be added by contacting the Call Center Studio Project Manager):

21. Select the desired language from the dropdown list. An example is shown below:

22. Click the Select button, 

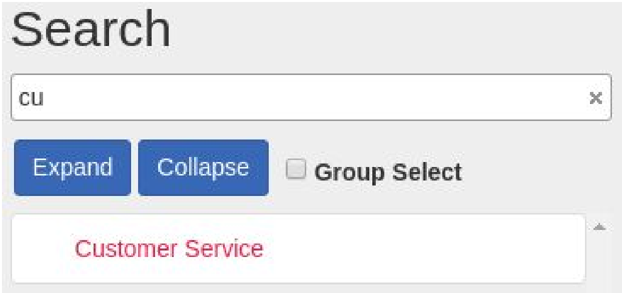
to the right of the "Tag" input box. The following pop-up window will appear:



Note: Only Tags that were made available for the chat can be viewed here (See **Tag** *Section)*

23. Search for a Tag using the "Search" input box shown below:

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



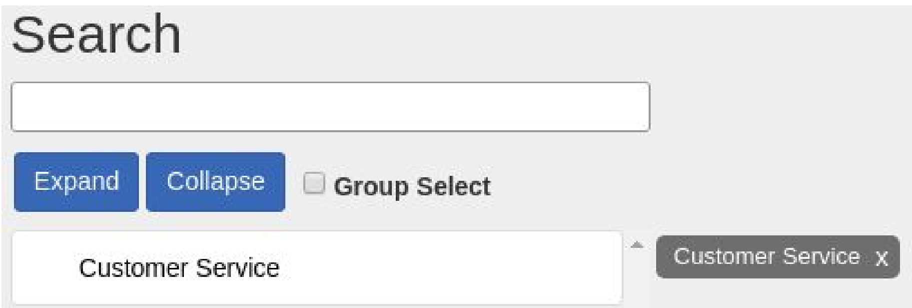
Note:

Press the Expand button, Expand*, to expand the selection (Used for child tags)*

Press the Collapse button, Collapse*, to collapse the selection (Used for child tags)*

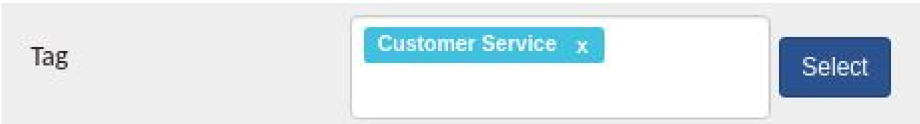
Check the Group Select Checkbox, Group Select*, to group select tags*

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the "X," X, to the right of the tag name.

24. Once the desired Tag selections have been selected and can be viewed to the right of the tag list box click the save button, Save, the "Tag" input box with an example selection is shown below:



25. Click the "Support Email" type the desired support email. An example is shown below:

26. Following the "Support Email" input box, the are three checkbox selections outlined below select the desired checkboxes:

Email Optional	Makes the email optional for the customer to input.
Phone Optional	Makes the phone optional for the customer to input.
Show Ended Chats on the Agent Screen.	Shows that the chat ended on the agent's screen.

27. Click the “Title Background Color” input box. A color palette will appear, as shown below:

Note: the default color code is “FFFFFF” representing the color white. All colors within the palette have unique color codes so they can be duplicated.

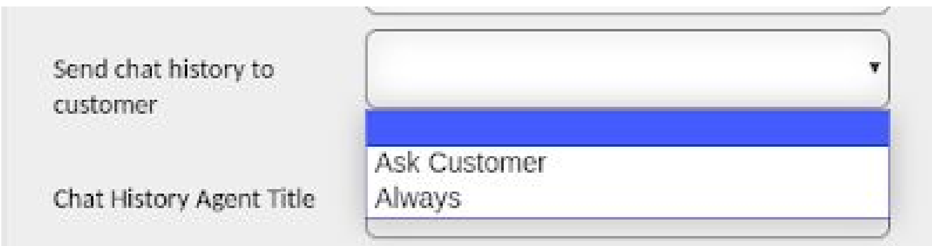
28. Select the desired custom color an example selection is shown below:

29. Click the “Title Text Color” input box, repeat steps 20 -21.
30. Click the “Start button Color” input box, repeat steps 20-21.
31. Click the “Send button Color” input box, repeat steps 20-21.

32. Click the “Logout button Color” input box, repeat steps 20-21, an example is shown below once all of the custom color selections have been completed:

33. Click the “System Nickname” Input box, if desired, type a system nickname the example is shown below:

34. Click the “Send Chat History to Customer” input box, a dropdown list will appear with the following two options:

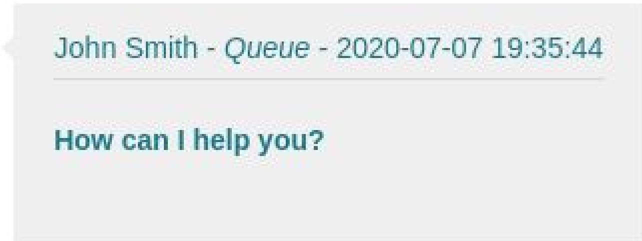


Note: the selection can also be left blank.

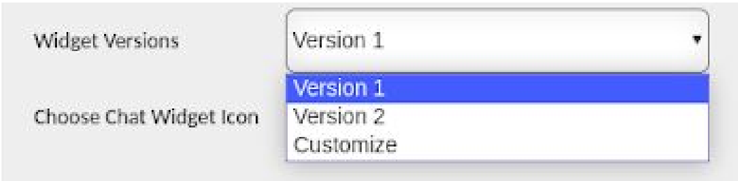
35. Select the desired option, an example selection is shown below:

36. Click "Chat History Agent Title", type a title an example is shown below:

Note: This screenshot has been taken from the Chat Record in Quality Control from the Chat History Tab, The "Chat History Agent Title" can be found in between the agent's name and the chat date as shown below:



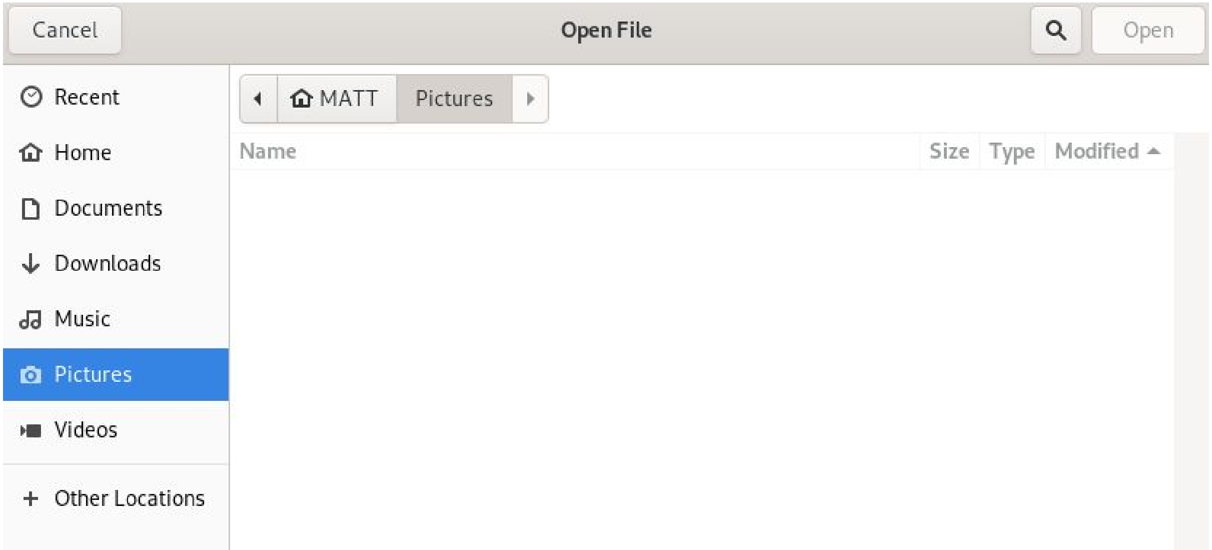
37. Click the "Widget Versions" input box, a dropdown list of created widget versions will be displayed along with a customize option an example dropdown selection is shown below:



Version 1	Shows the chat window on the customer's screen with square corners. (Used for webchat aka CCS Chat).
Version 2	Shows the chat window on the customer's screen with rounded corners. (Used for webchat aka CCS Chat).
Customize	Shows the chat window on the customer's screen with rounded corners, and a custom logo can be added to the chat window as well. (Used for webchat aka CCS Chat).

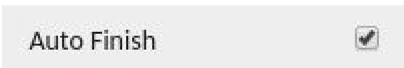
38. Select the desired widget version an example selection is shown below:

39. To the left of the title "Chose Chat Widget Icon," (Used exclusively for creating an icon for the webchat (aka CCS Chat) files can be uploaded in .png, .jpeg, .jpg) click the choose file button, Choose File , to create a custom chat icon from saved photos on the device. A pop-up window will appear showing your saved files as shown below:



40. If a custom icon is desired, navigate to the appropriate saved location and select the appropriate image, once selected the pop-up window will show the saved image, an example is shown below:

41. Next to the "Auto Finish" checkbox, check auto finish if desired to auto finish the chat, the checked Auto Finish checkbox is shown below:



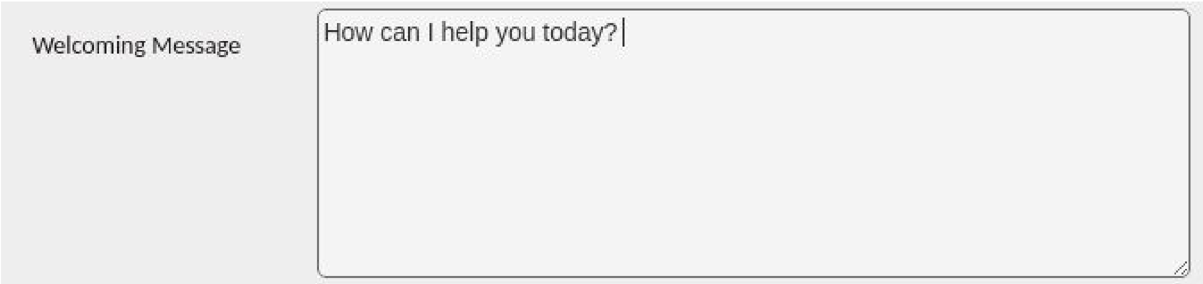
42. In the “Auto Finish Duration” input box type the desired time frame for the chat to auto finish (only can be used if the “Auto Finish” checkbox is checked) an example time frame is shown below:

43. Click the “Action Type After Parking” input box a dropbox will appear. Select, if desired, the appropriate action after parking. The three actions are described below:

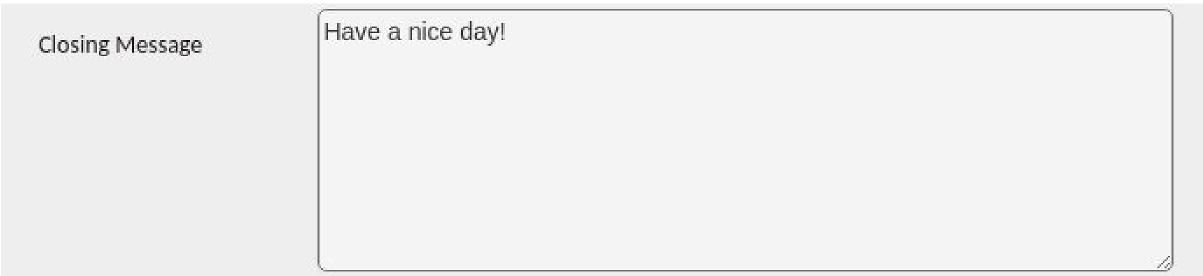
Go to Queue.	When parking is pressed by the agent, the customer will be transferred to the queue.
Go to Queue and reserve the parking agent.	When parking is pressed, the customer will be placed on hold. Agents can answer other chats, but when the customer responds the same agent will receive the chat.
Start ICR.	When parking is pressed, the customer will be transferred to the ICR assigned to the chat widget.

44. In the “First Welcoming Message” input box, type a first welcoming message for the chat if desired an example is shown below:

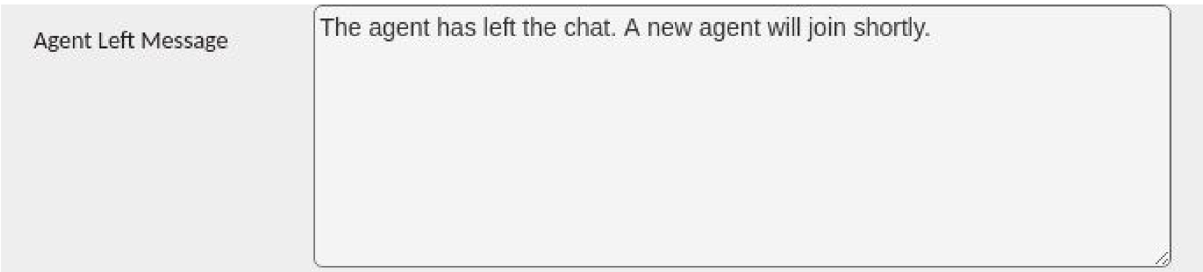
45. In the “Welcoming Message” input box, type a welcoming message for the chat if desired an example is shown below:



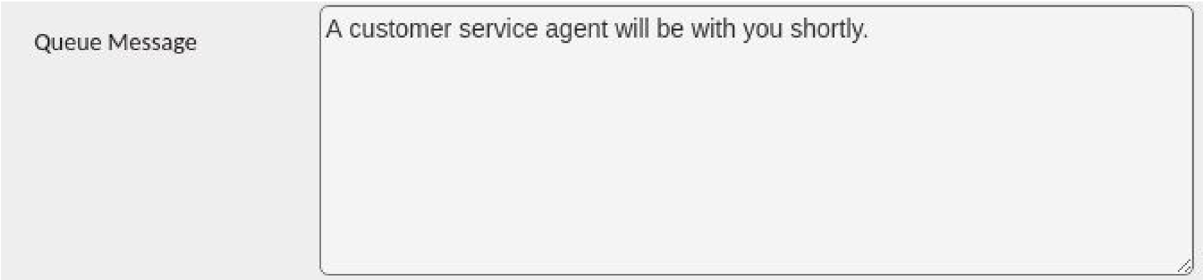
46. In the “Closing Message” input box, type a closing message for the chat if desired an example is shown below:



47. In the “Agent left Message” input box, type an Agent Left message for the chat if desired an example is shown below:

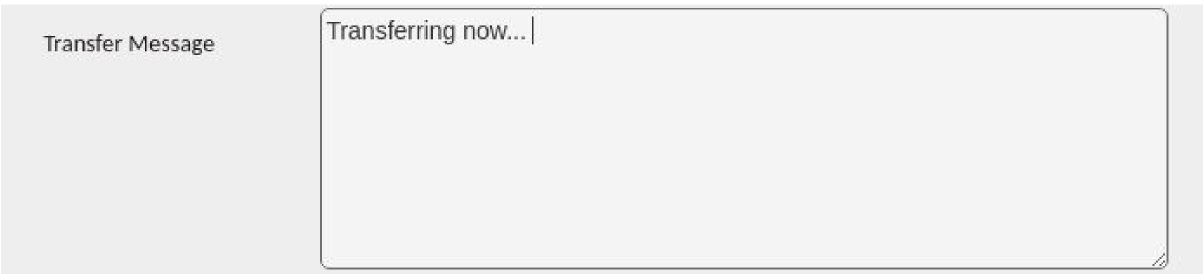


48. In the “Queue Message” input box, type a queue message for the chat if desired an example is shown below:

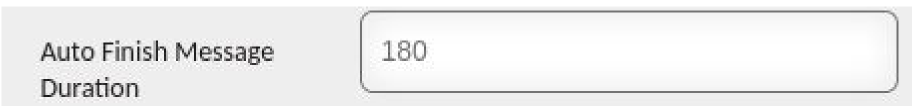


49. In the “Auto FInish Message” input box, type an auto finish message for the chat if desired an example is shown below:

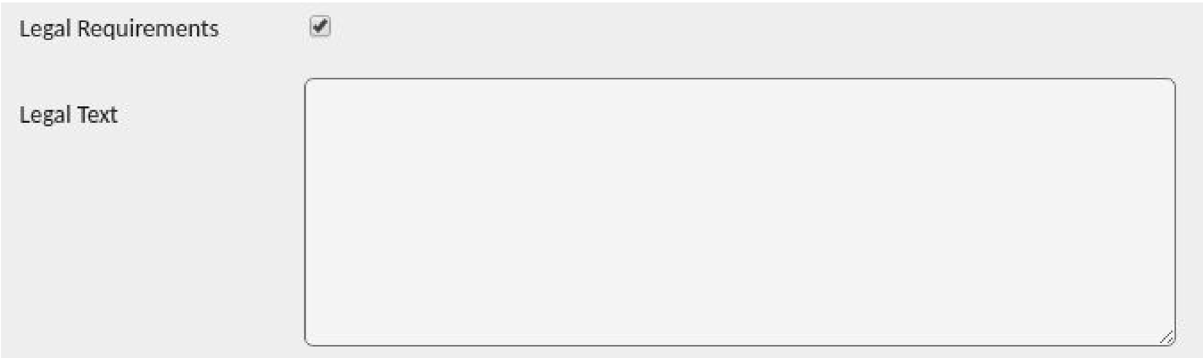
50. In the “Transfer Message” input box, type a transfer message for the chat if desired an example is shown below:



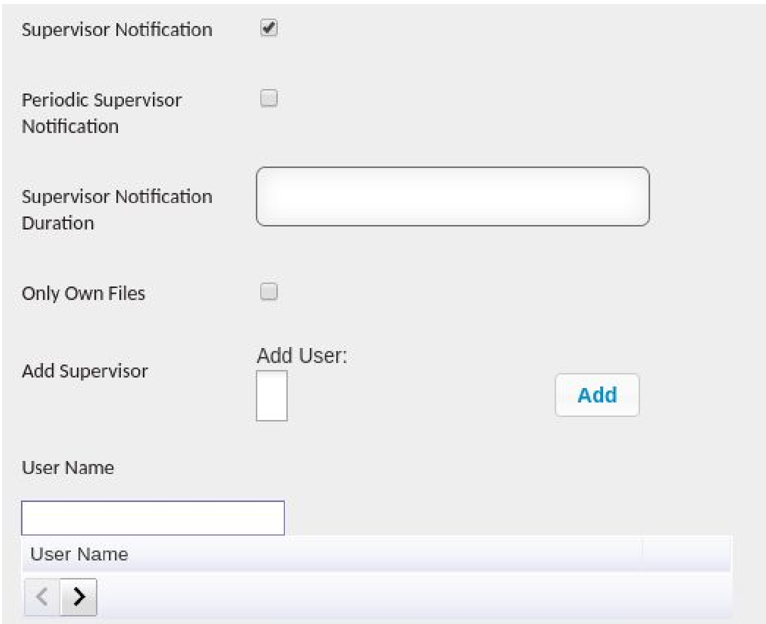
51. In the “Auto Finish Duration” input box, type a time duration for the chat to Auto Finish if desired an example is shown below:



52. If a legal message is desired in the chat check the checkbox entitled “Legal Requirements,” when the box is checked the following “Legal Text” input box will be displayed:



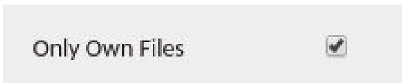
53. If desired in the “Legal Text” input box type the desired legal text.
54. If supervisor notifications are desired for the chat check the checkbox entitled “Supervisor Notification,” when the box is checked the following will be displayed:



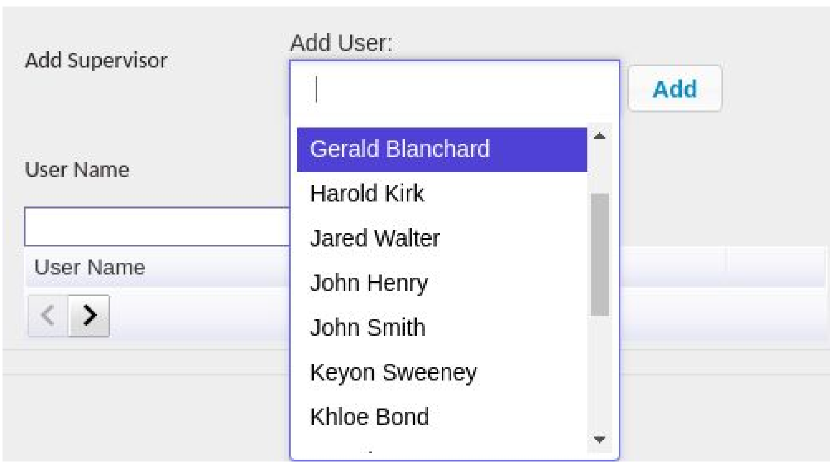
55. If periodic supervisor notification is desired, check the “Periodic Supervisor Notification” checkbox as displayed below (When selected if an agent does not respond within the Supervisor Notification Duration to a customer’s chat, the supervisor will receive a notification):

56. Click the “Supervisor Notification Duration” input box, type the desired supervisor notification duration an example is displayed below:

57. Check the “Only Own Files” checkbox, an example is shown below (When selected agents cannot upload files from their desktop to send to a customer, they can only use the template messages created in the tenant with attachments):

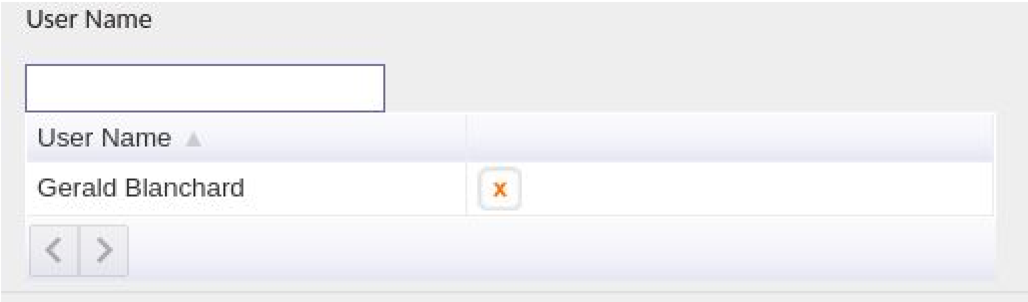


58. Click the “Add Supervisor” input box and start typing the name of the supervisor to add a dropdown list will appear to facilitate in choosing a supervisor as shown below:



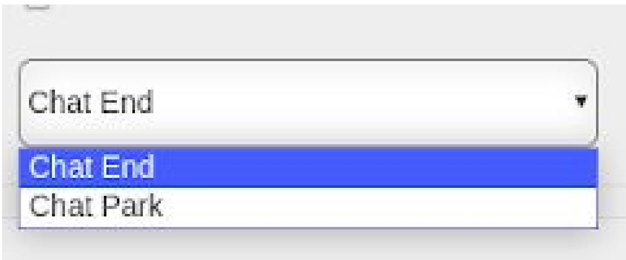
59. Select the desired Supervisor and click the add button, Add .

60. The supervisor's name will appear in the "User Name" field an image of this field is shown below:



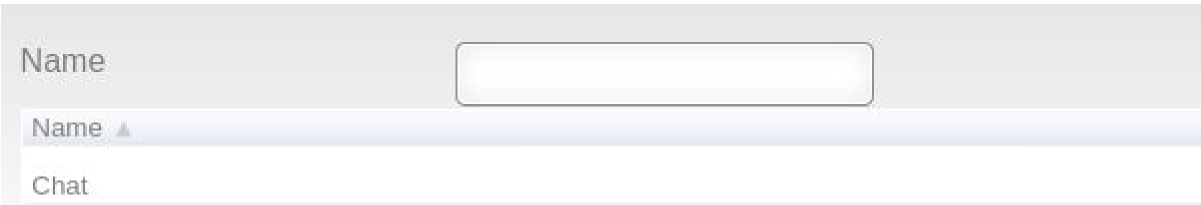
Note: To delete a supervisor, click the delete button, x , located to the right of the supervisor's name.

61. Click the "Finish Button Action Type" input box a dropdown list will appear with two selections described below choose the desired selection or none at all:



Chat End	Ends the chat.
Chat Park	Parks the chat, which means if the client's customer responds to the chat again within 24 hours. The same agent can respond to the chat and also review the prior conversation.

62. If Template Messages or customized messages are desired (See the Template Messages and Customize Sections) otherwise click the save button, Save, the created WhatsApp business chat can be viewed in the chat widget name list as shown below:



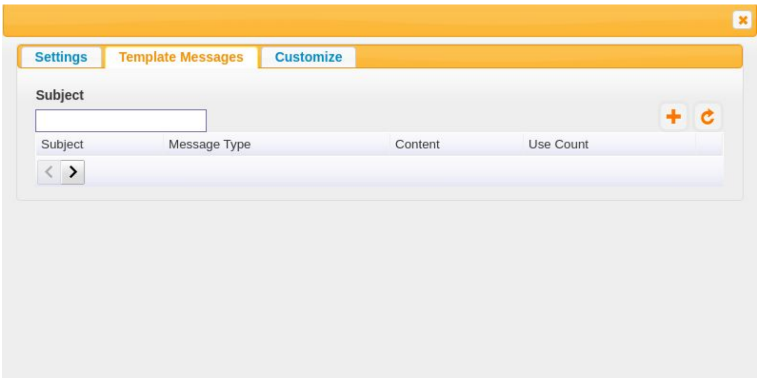
Creating a Template Message (Template messages Tab)

Template messages are prewritten messages that the agent can use to expedite customer service requests. Normally messages are created based on frequently asked questions associated with the business.

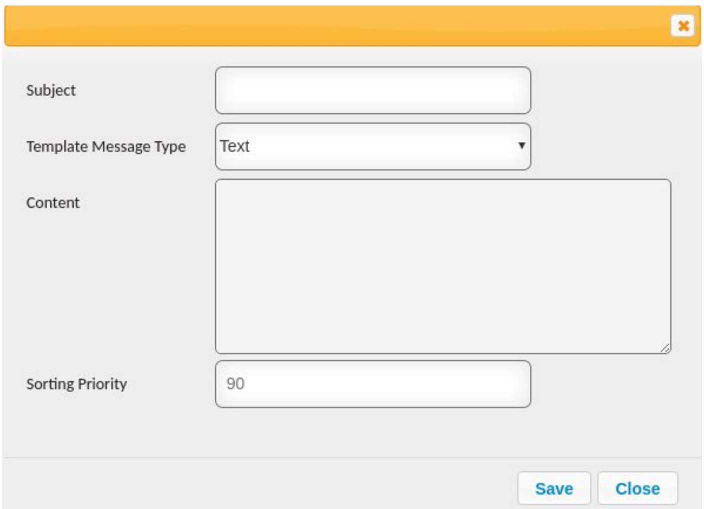
1. From the main widget pop-up screen click the Template Messages Tab, 

, located to the right of the settings tab, 

, the following screen will appear:



2. Click the "New" button, , located in the top right-hand corner of the pop-up window, the following screen will be displayed:

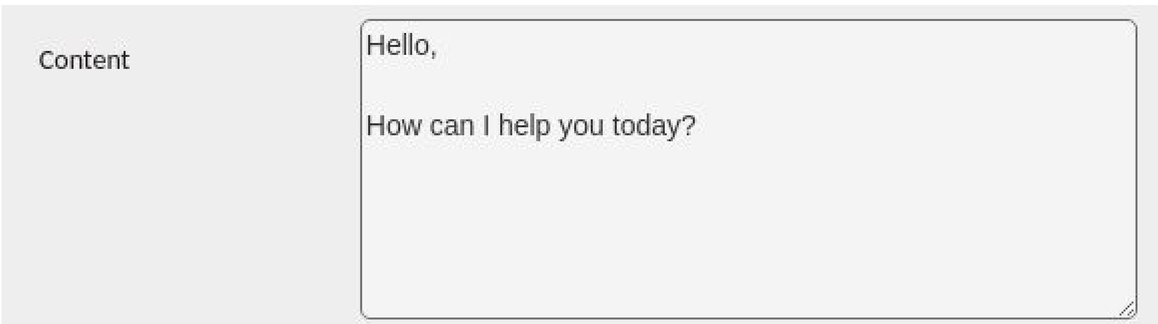


3. Click the "Subject" input box, type the subject of the template. An example is shown below:

4. Click the "Template Message Type" input box. A dropdown selection will appear with three selection types explained below to select the desired type from the list:

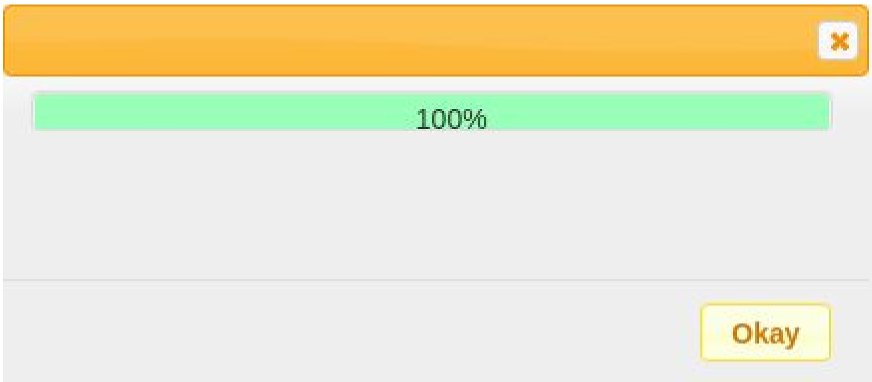
Text	Template message that sends the prewritten text.
Image	Template message that sends the uploaded image.
Document	Template message that sends the uploaded document.

5. Click the "Content" input box and type the content you want to display; an example is shown below:

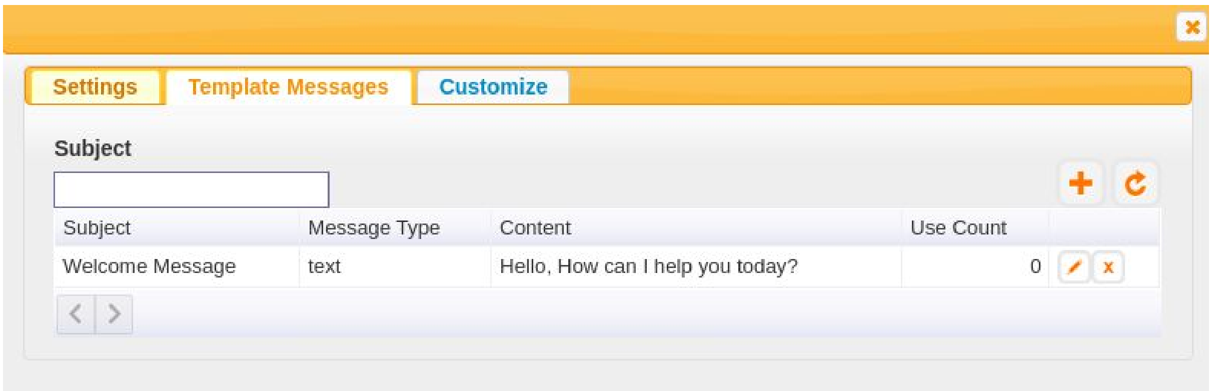


6. In the “Sorting Priority” input box, type the desired sorting priority (the higher the number, the template message will be listed closer to the top for easy agent selection). A default example is shown below:

7. After all the necessary modifications have been made to the template message, click the save button, Save, after a pop-up window shown below will appear:

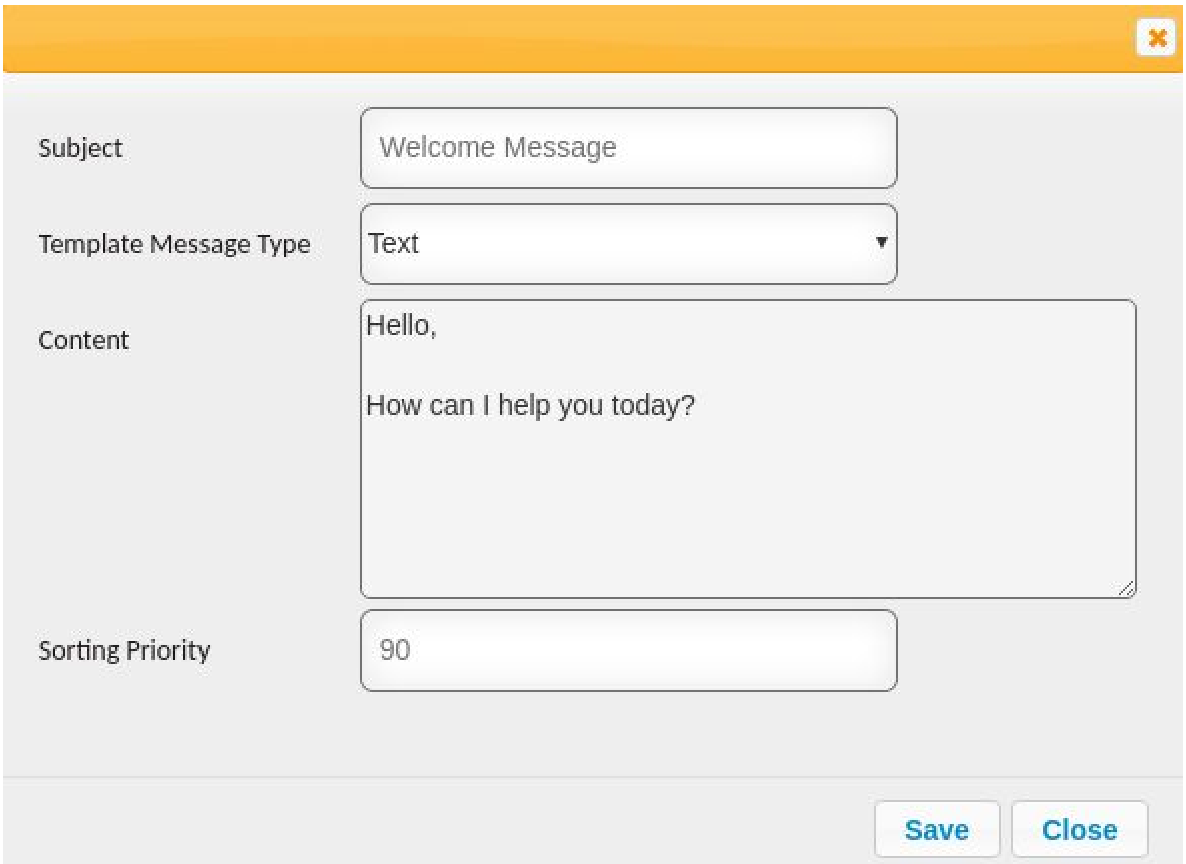


8. Click the Okay button, Okay, the created template message will appear in the template message name list as shown below:



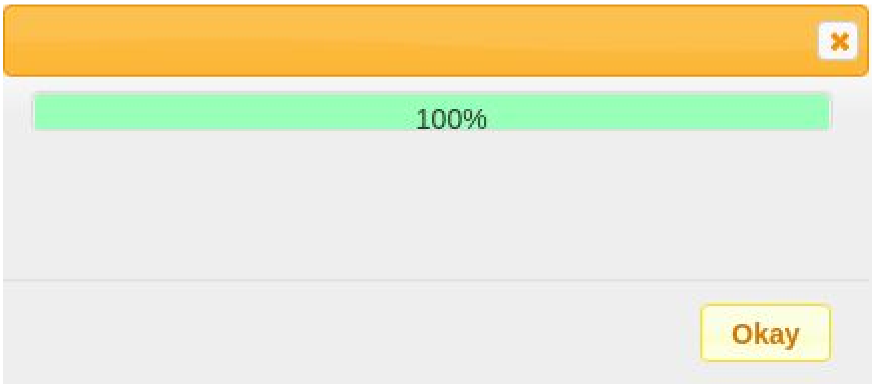
Editing a Template Message

1. Click the edit button, , located to the right of the user count column, after clicking the following pop-up window will be displayed:

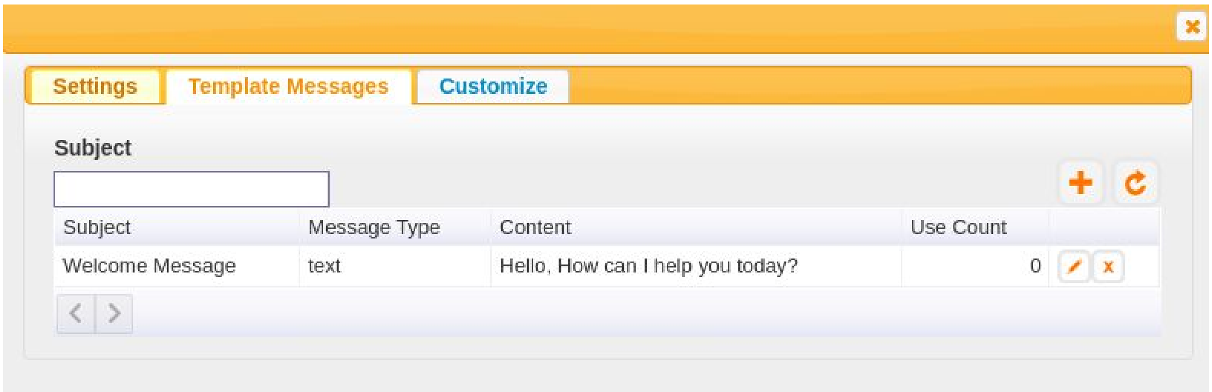


2. Make necessary changes to the template message *(See* **Creating a Template Message** *section).*

3. After all the necessary modifications have been made to the template message, click the save button, Save , after a pop-up window shown below will appear:

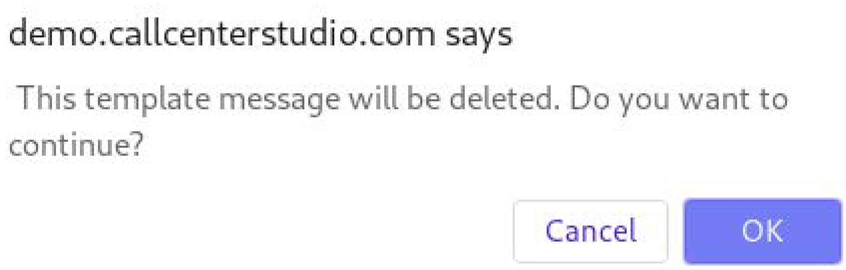


4. Click the Okay button, Okay , the edited template message will appear in the template message name list as shown below:



Deleting a Template Message

1. Click the delete button,  , located to the right of the edit button. The following pop-up will be displayed:



- *Select the cancel button,*  *, to cancel the deletion.*
- *Select the OK button,* *, to confirm the deletion.*

2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted team will not be shown.

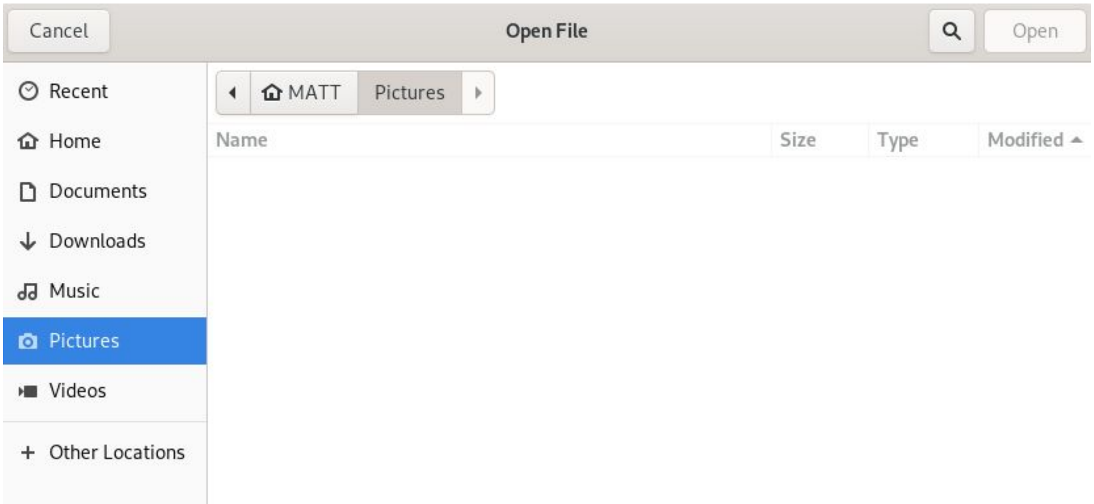
Searching for a Template Message

1. Click the “Search:” input box, type part of the subject, to filter the search results until the widget is located.

Creating a Chat Widget (Customize Tab)

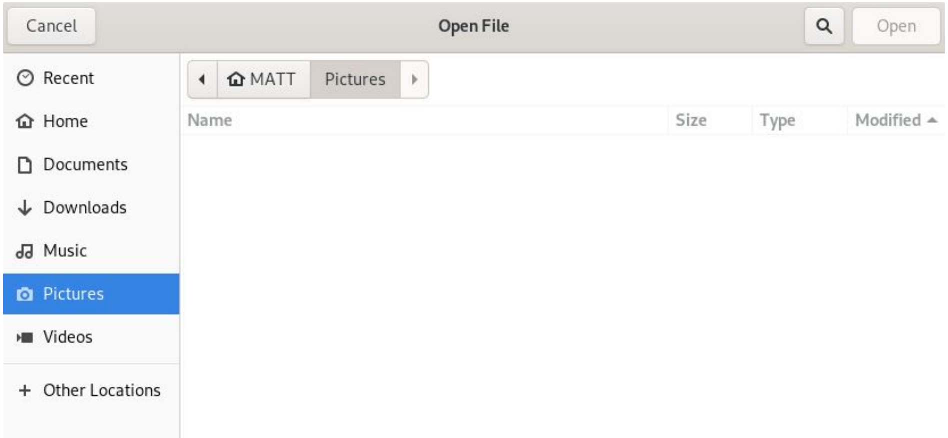
1. From the settings tab, select the Customize tab, Customize .

2. To add a Widget logo, click the choose file option, Choose File , to the right of "Choose Chat Widget Logo," the desktop folder will pop-up as shown below:



3. Select the desired image for the chat widget logo. JPEG, .PNG, & .JPG are acceptable formats.

4. To add a chat message Avatar, click the "Choose File" option, Choose File , to the right of "Choose Chat Message Avatar," the desktop folder will pop-up as shown below:



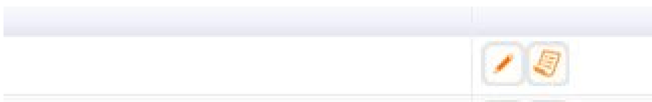
5. Select the desired image for the chat message Avatar. JPEG, PNG, & JPG are acceptable formats.
6. If desired, to the right of "Use Agent Profile Avatar," check the checkbox if desired to use the Agent Profile Avatar.
7. If custom HTML is desired, click the "Customize HTML" type the customized HTML. (Custom HTML: Webchat has a standard interface (two default versions, one customizable). However, a different interface may be desired. Call Center Studio has developed a library of customizable web chat versions that can be prepared, or the Call Center Studio Development team can also make one. The customized interface has an HTML file that needs to be written in this input box.)
8. Click the Save button, 

, below the "Customize HTML" to save the customized HTML.
9. Click the save button, 

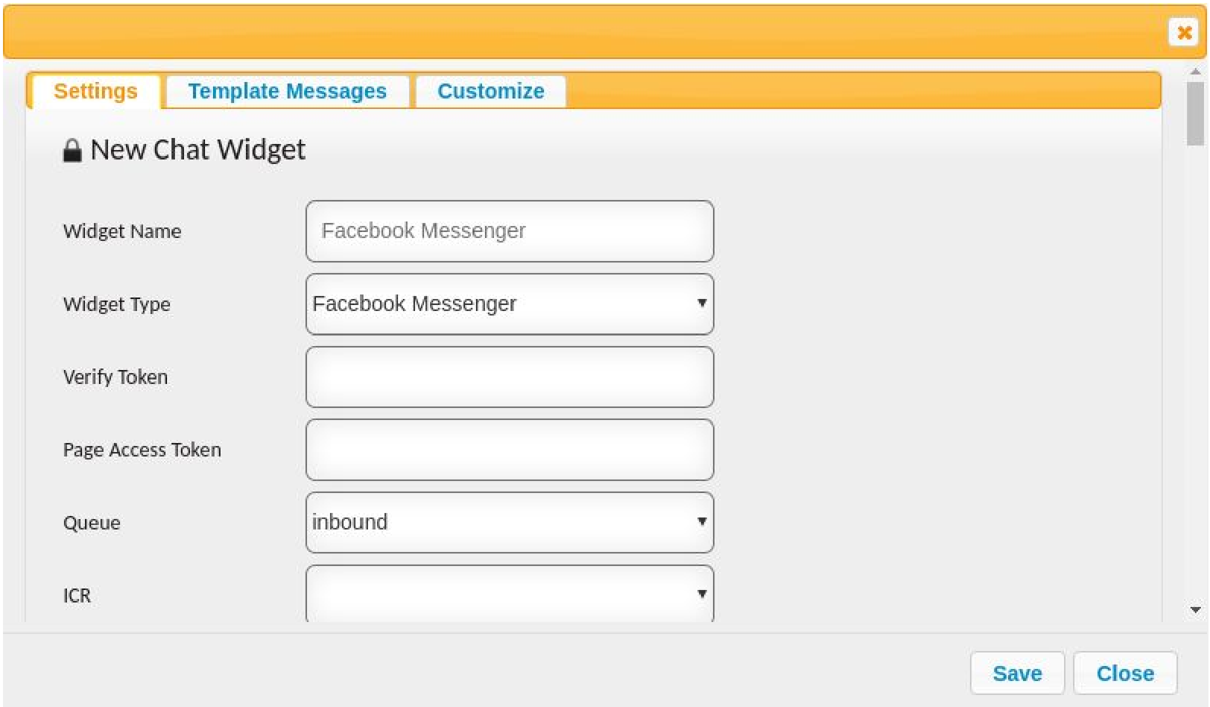
, to the lower right-hand corner of the pop-up window to save the customize tab.

Editing a Chat Widget

1. To edit a chat widget, click the edit button, , located on the far right of the Chat Widget as shown below:



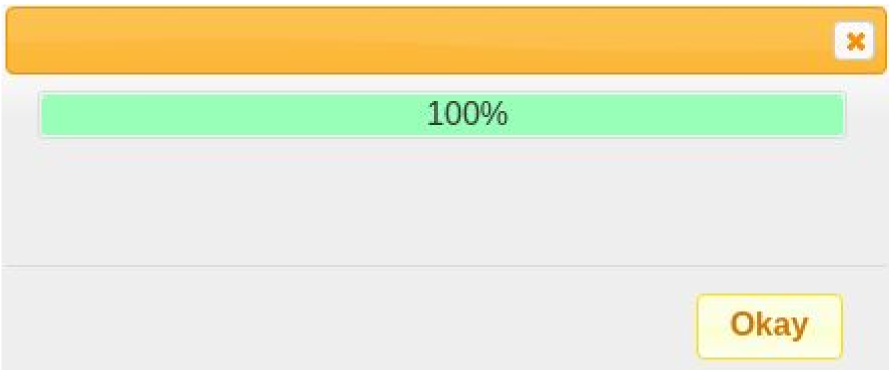
After clicking the edit button, the chat widget pop-up window will appear as shown:



2. Make the following changes and modifications to the chat widget as necessary (See the Creating Chat Widget Sections).

3. Once the desired changes have been completed, the information can be saved by clicking the save button, 

, the following pop-up box will appear:

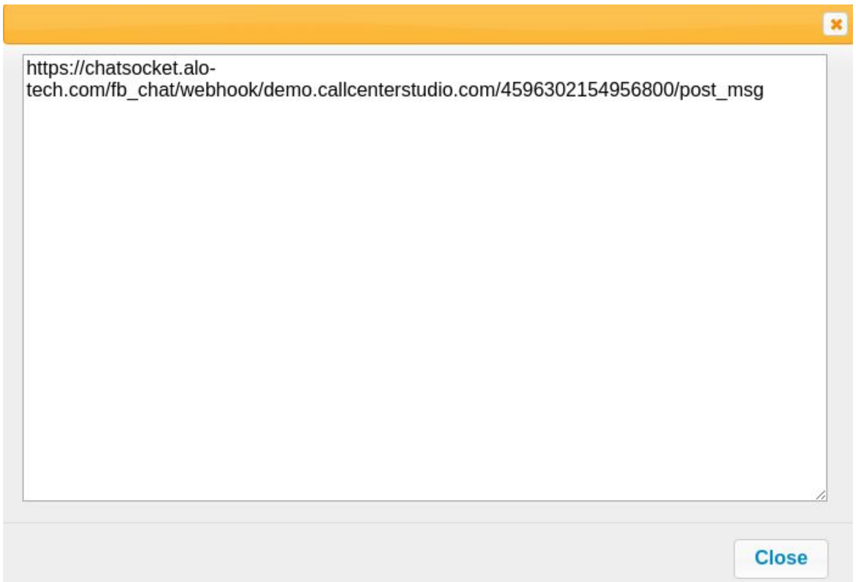


4. Click the Okay button, Okay, to confirm the changes.

Chat Widget URL and Testing the Chat Widget

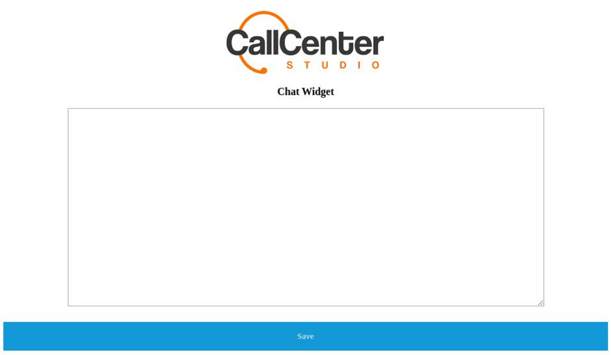
This URL is used for testing the chat widget:

1. To the left of the edit button, , click the show button, , the following pop-up will be displayed:

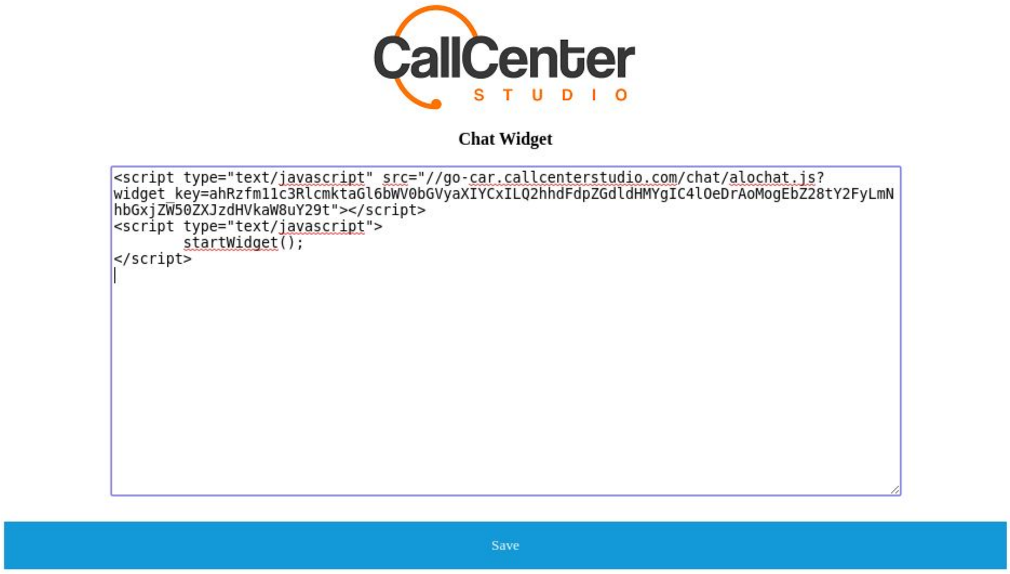


2. Click inside the window, highlight, and copy the entire URL.
3. Open a new tab using this URL: http://chat-test.callcenterstudio.com/.

The following screen will appear:

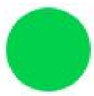


4. Paste the copied chat URL link into the input box on the chat test page. An example is shown below:

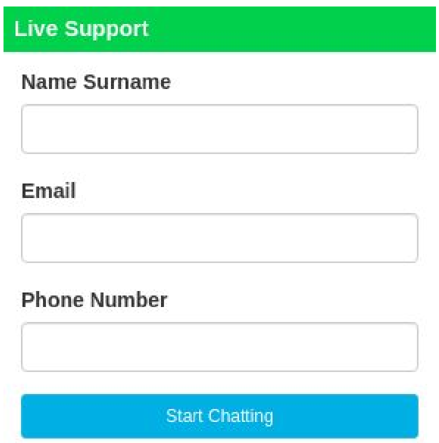


5. Click the save button, 

. The following will appear in the lower right-hand corner:



6. Click the green dot. The chat window will be displayed. An example is shown below:



7. Fill out the Name Surname, Email (If optional was not checked), Phone Number (If optional was not checked)

8. Click the Start Chatting button, 

,to begin testing the chat.

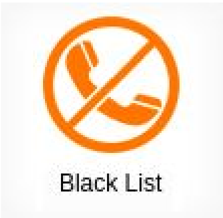
Searching for a Chat Widget

Name

1. Click the "Name" input box, type the chat widget's name, as shown below:

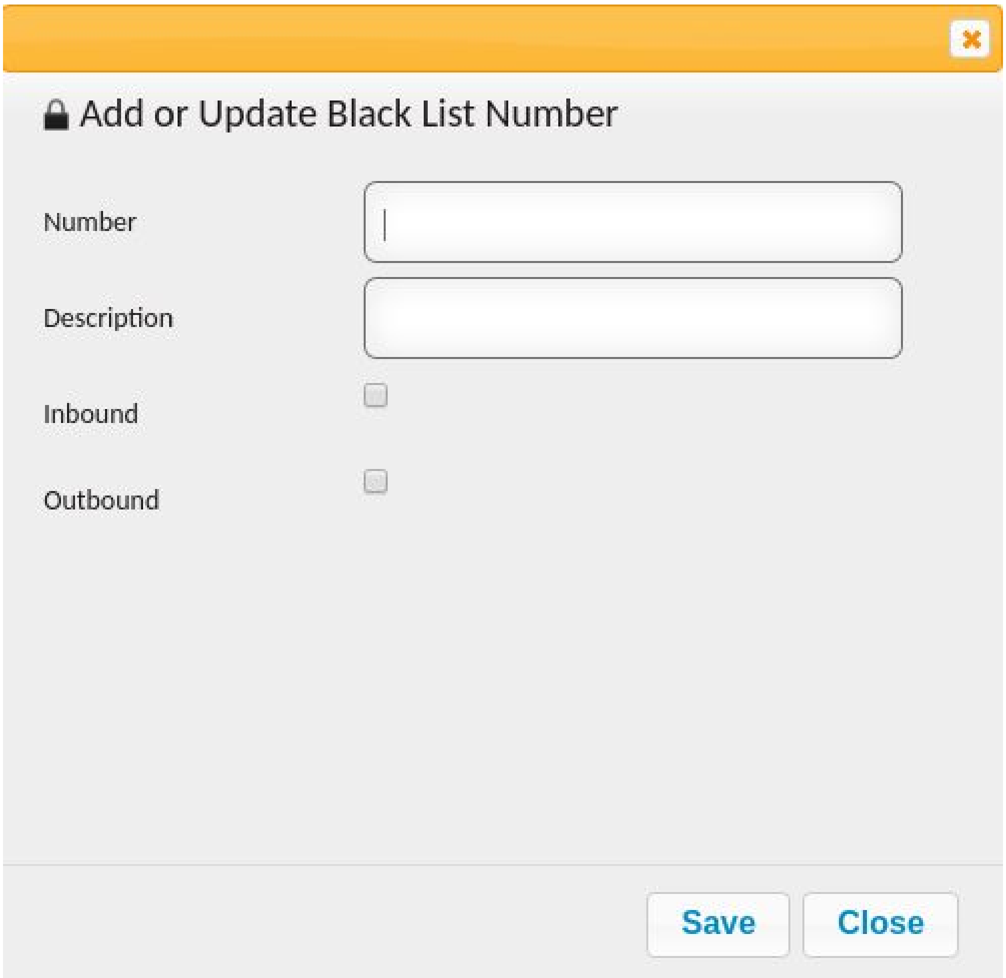
Note: Partial names can be used, when spelled correctly.

Black List



Adding a New Black List Number

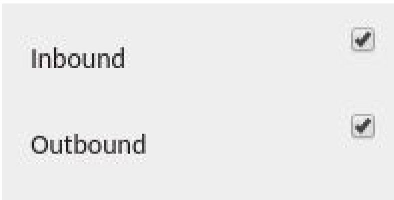
1. Press the add button,  , in the top right-hand corner of the Black List screen, the following pop-up will be displayed:



2. Click the "Number" input box, type the blacklisted number an example is shown below:

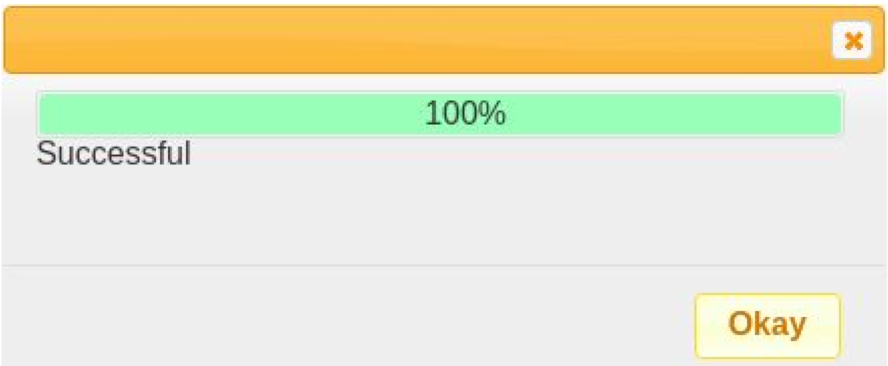
3. Click the "Description" input box, type a description if desired an example is shown below:

4. The number can be blocked from inbound or outbound calls by checking the inbound or outbound checkboxes an example is shown below:

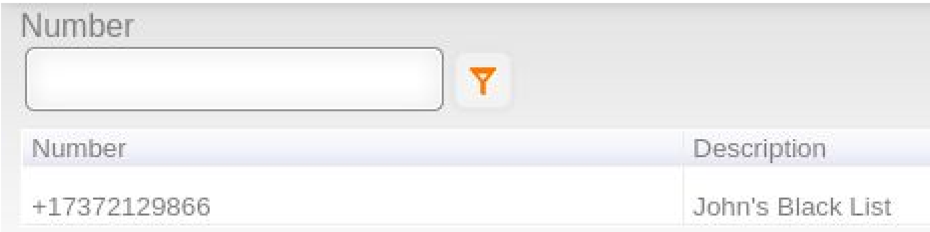


5. After additions have been made click the save button, 

, the following pop-up will be displayed:

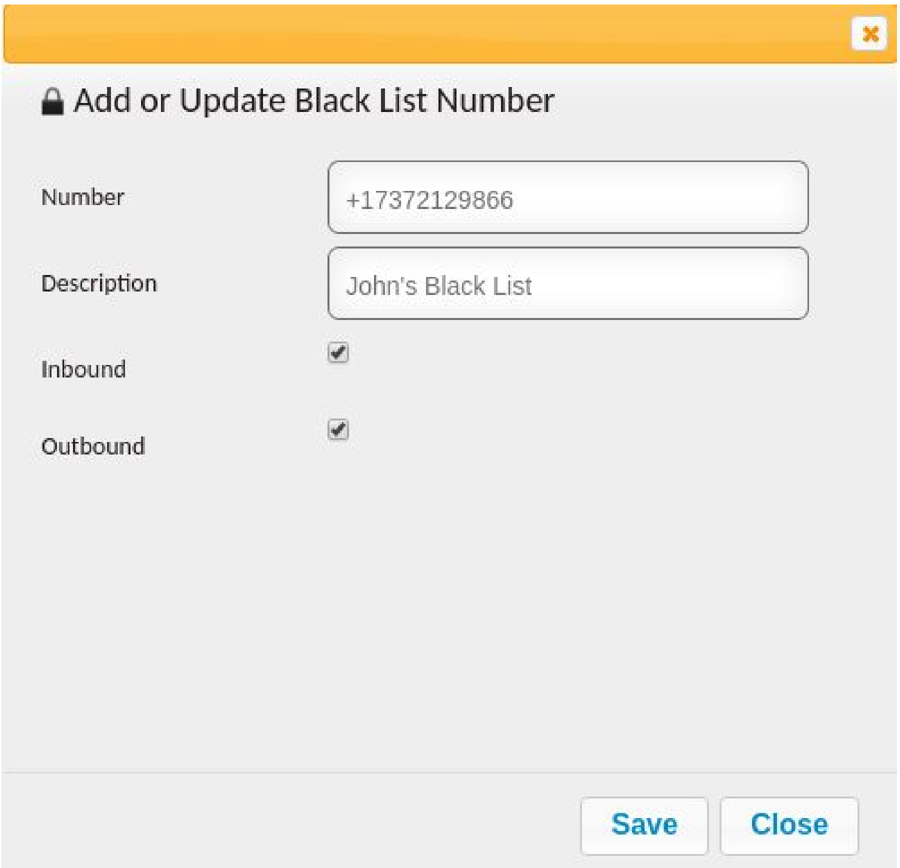


6. Click the Okay button, Okay , the blacklisted number will be shown in the Black List name list the created example is shown below:



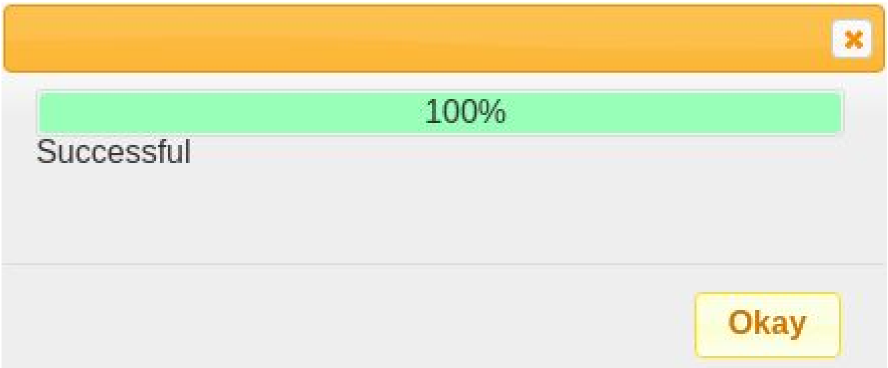
Editing a Black List Number

1. Click the edit button, , located to the right of the dialer column, after clicking the following pop-up window will be displayed:

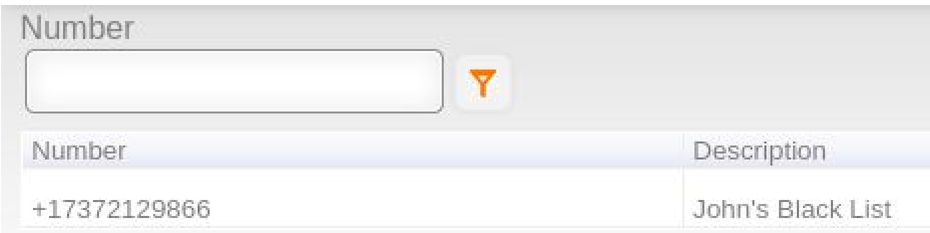


2. Make changes as desired.

3. After additions have been made click the save button, Save, the following pop-up will be displayed:

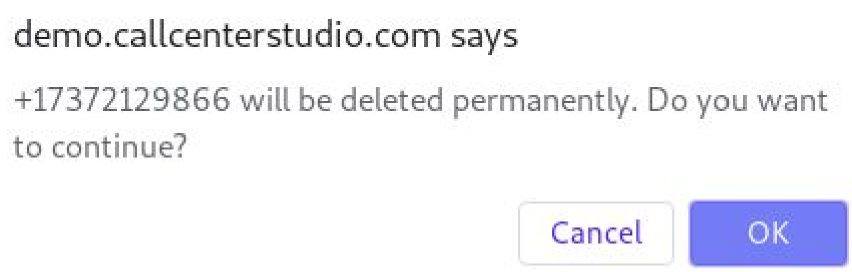


4. Click the Okay button, Okay, the blacklisted number will be shown in the Black List name list the created example is shown below:



Deleting a Black List Number

1. Click the delete button, , located to the right of the edit button. The following pop-up will be displayed:



- *Select the cancel button, , to cancel the deletion.*
- *Select the OK button, , to confirm the deletion.*

1. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted blacklisted number will not be shown.

Searching a Black List Number

1. Click the “Number” input box, type the blacklisted number an example is shown below:

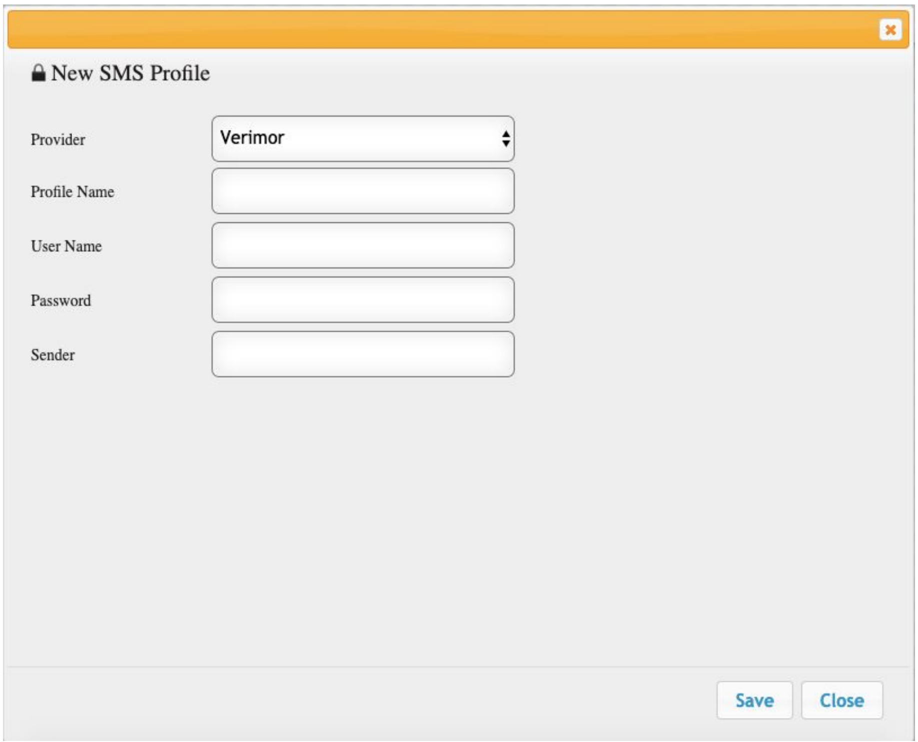
Note: Partial numbers can be used. The filter button,  *, can also be used.*

SMS Profiles

Used for setting up the SMS profile. Call Center Studio can integrate with other applications to send SMS messages to customers.

Adding an SMS Profile

1. Click the New button, , located in the top right corner of the screen. The following pop-up screen will appear as shown below, in the "Dialing Rule Name" input box, type the name of the dialing rule:



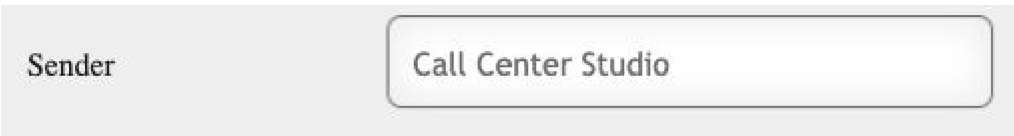
2. Click the desired "Provider," example of providers can be seen below, if down correctly, the selection will look like the picture below:

3. Click the "Profile Name" input box, type the SMS's profile name in the layout shown below:

4. Click the "User Name" input box, type user name in the layout shown below:

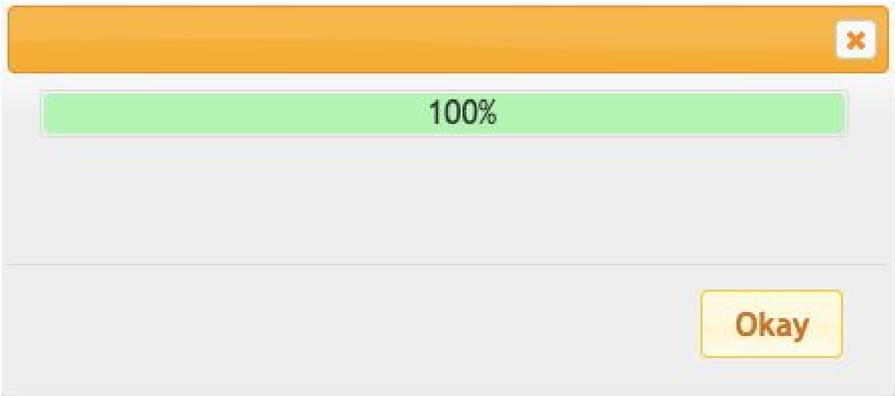
5. Click the "Password" input box, type preferred password in the layout shown below:

6. Click the "Sender" input box, type sender name in the layout shown below:



7. After all the desired additions have been made, click the save button, 

, the following pop-up window will appear:

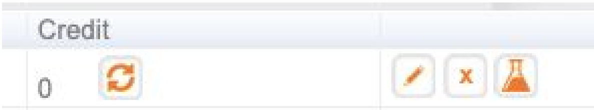


8. Click the Okay button, 

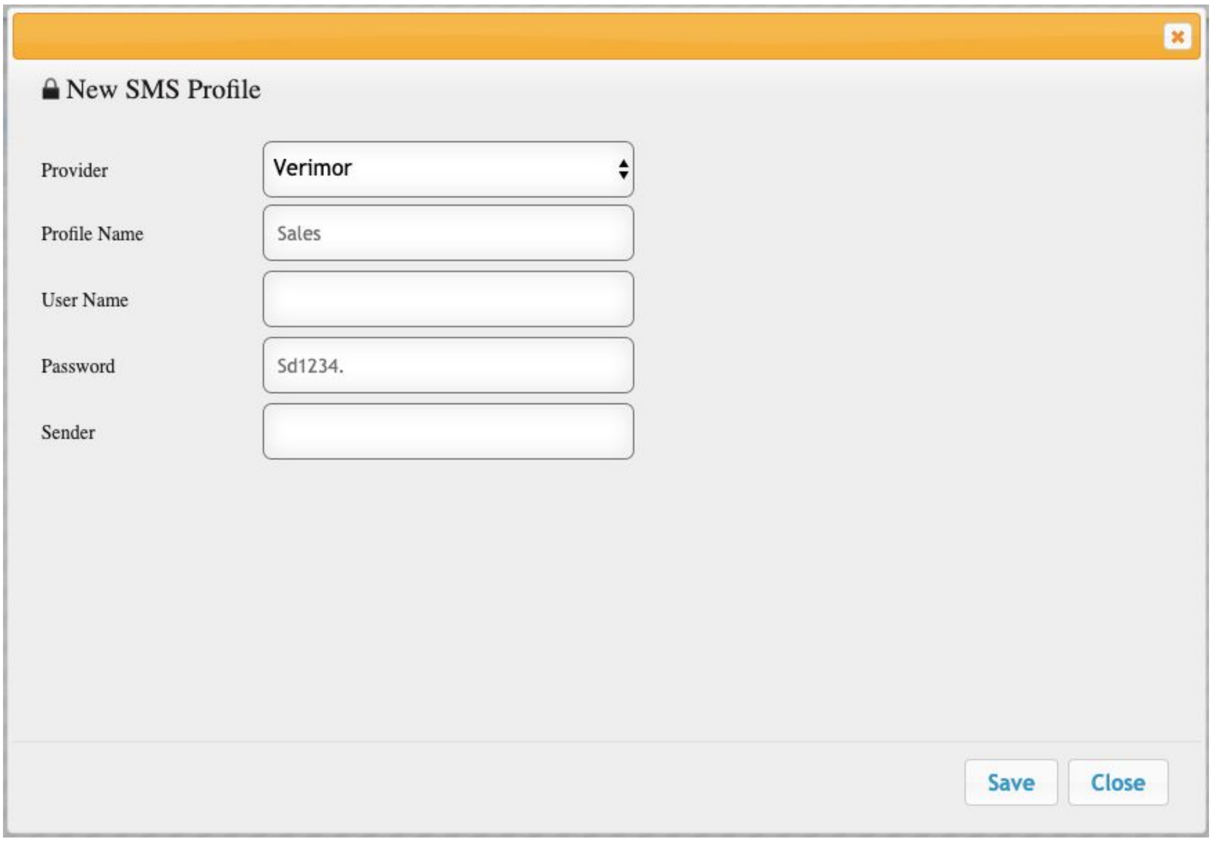
, the new SMS profile will be created.

Editing an SMS Profile

1. To edit an SMS profile, click the edit button, , located on the far right of the Profile Name after the "Credit Column" as shown below:

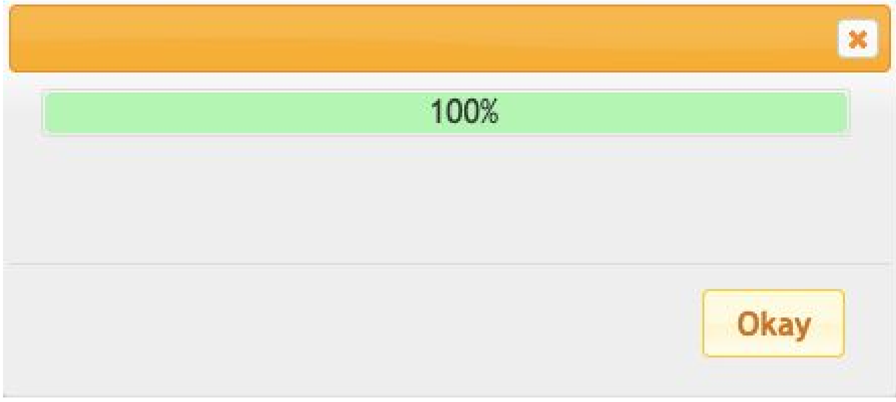


After clicking the edit button, the contact pop-up window will appear as shown:



2. Make changes as desired.

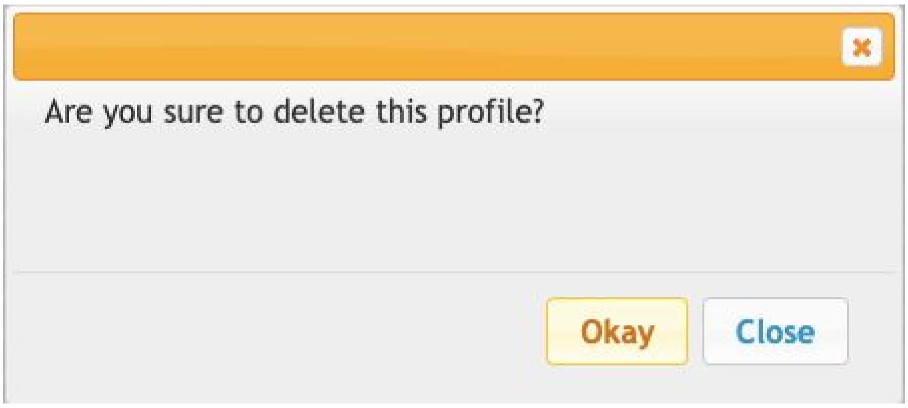
3. Once the desired changes have been completed, the information can be saved by clicking the save button, Save, the following pop-up box will appear:



4. Click the Okay button, Okay, to confirm the changes.

Deleting SMS Profiles

1. From the SMS profiles list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



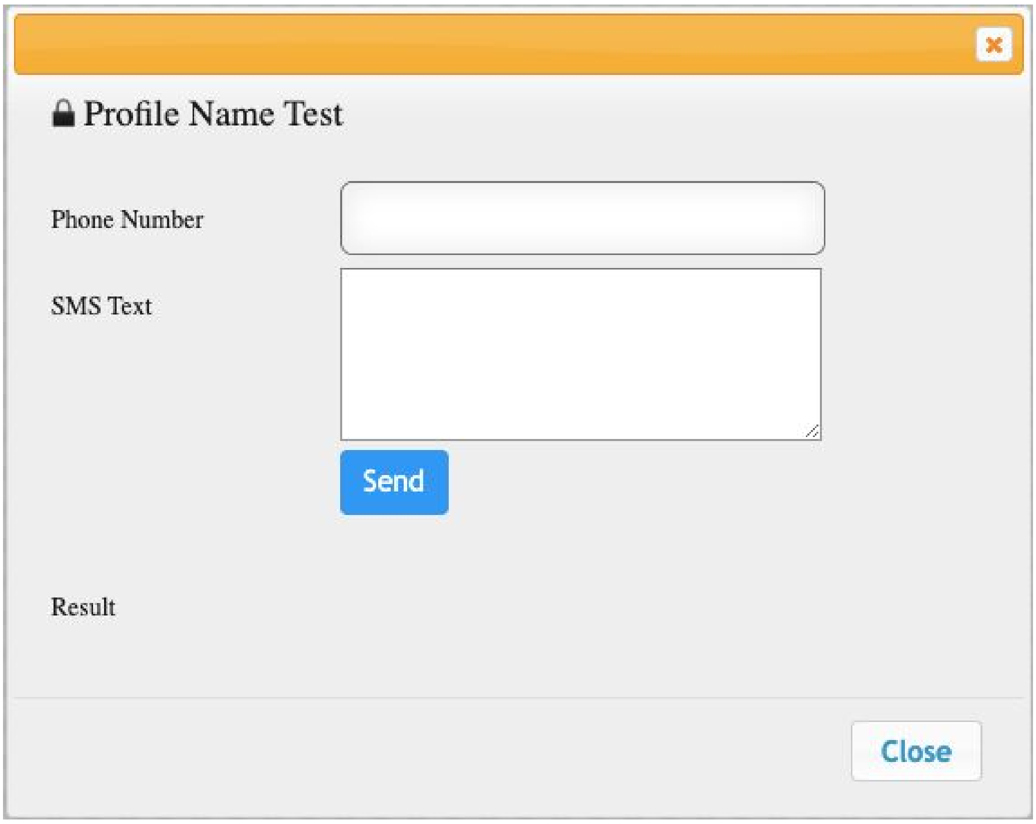
- *Select the close button,*  *, to cancel the deletion.*
- *Select the Okay button,*  *, to confirm the deletion.*

2. Confirm the deletion by clicking the Okay button, .

The screen will reload, and the deleted SMS profile will not be shown.

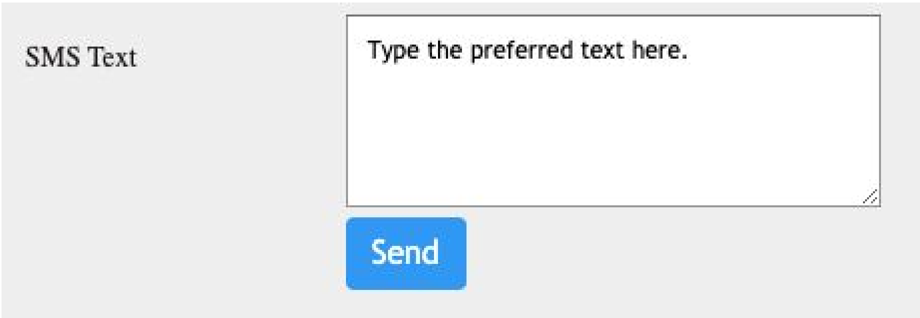
Testing an SMS Profile

1. From the SMS profiles list, click the delete button, , to the right of the delete button, . When the test button is clicked the following pop-up will appear:



2. Click the "Phone Number" input box, type the phone number which the SMS will be sent in the layout shown below:

3. Click the “SMS” input box, type the preferred SMS text in the layout shown below:



4. Click the Send button, 

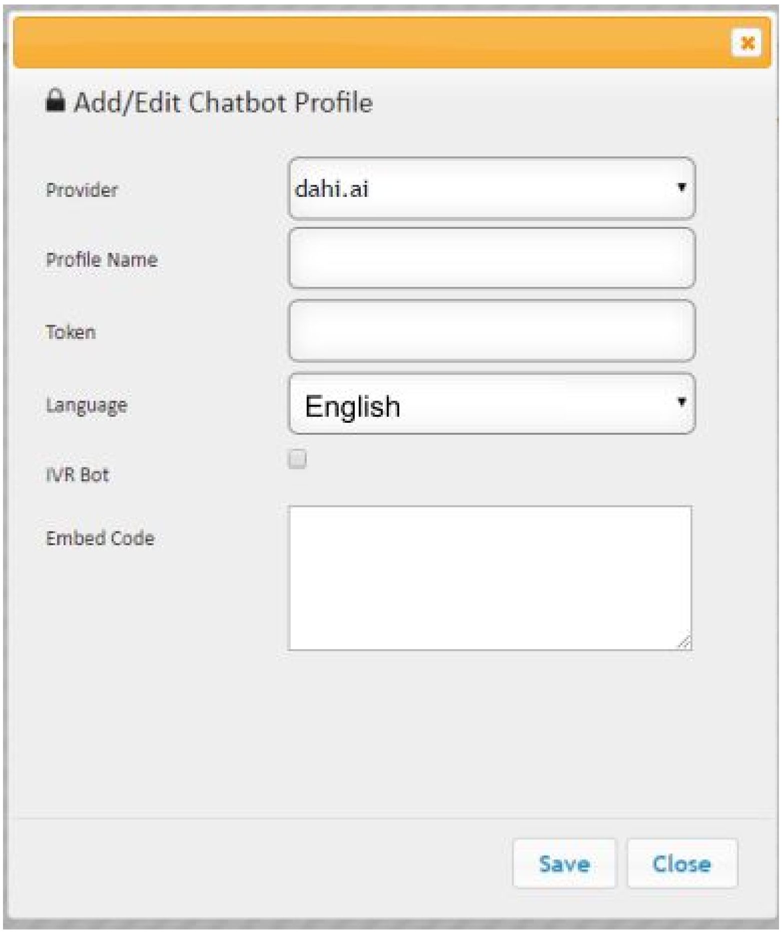
. If done correctly, to the right of the send button, the test result will be displayed.

Chatbot

A chatbot is a software application which regulates online chat conversations through the use of texts or texts to speech instead of providing direct contact with a live human agent.

Creating a chatbot

1. Click the new button, , located in the top right corner of the contact screen; the following pop-up screen will appear below:

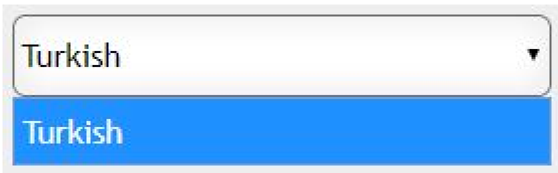


2. Click the "Provider" input box, a dropdown list of available providers will appear, select the desired provider (Providers are set up by the Call Center Studio Development Team). An example is shown below.

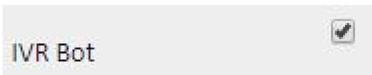
3. Click the “Profile Name” input box, type the desired profile name of the chatbot; an example is shown below:

4. Click the “Token” input box, type the desired token of the chatbot, an example is shown below:

5. Click the “Language layout,” a dropdown menu will appear showing the various languages available to choose from, as shown below:



6. Click the “IVR Bot” checkbox if desired, as shown below:

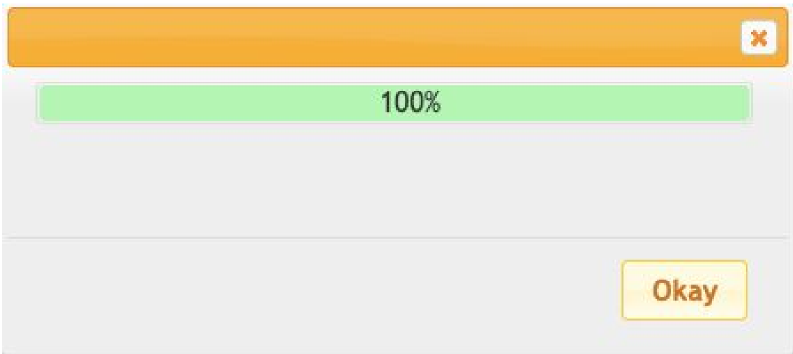


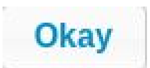
Note: the IVR bot, also known as interactive bot response, is a telephony technology that can read a combination of touch-tone and voice input.

7. No input has to be made in the embedded code field, used in certain situations exclusively by the assigned Call Center Studio Project Manager.

8. Once the desired changes have been completed, the information can be saved by clicking the 'Save" button, 

, the following pop-up box will appear:

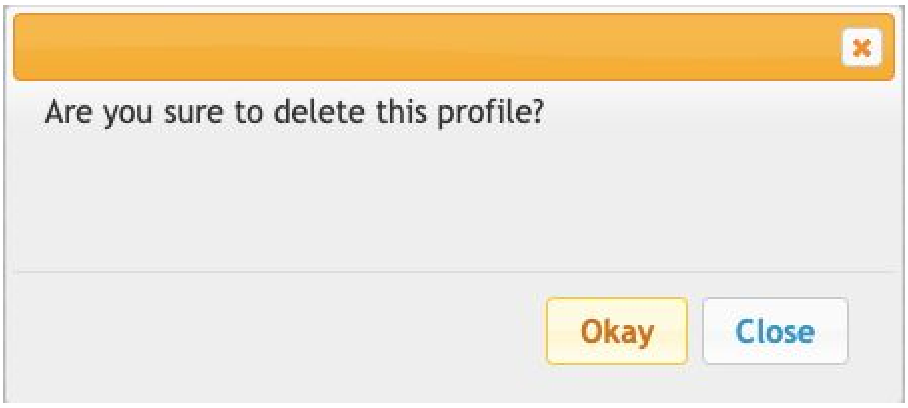


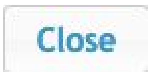
9. Click the "Okay" button, 

, to confirm the changes.

Deleting Chatbot

1. From the chatbot list, click the delete button, , for the desired chatbot. When the delete button is clicked the following pop-up will appear:



- *Selecting the "Close" button,* 

, will cancel the deletion.
- *Selecting the "Okay" button,* 

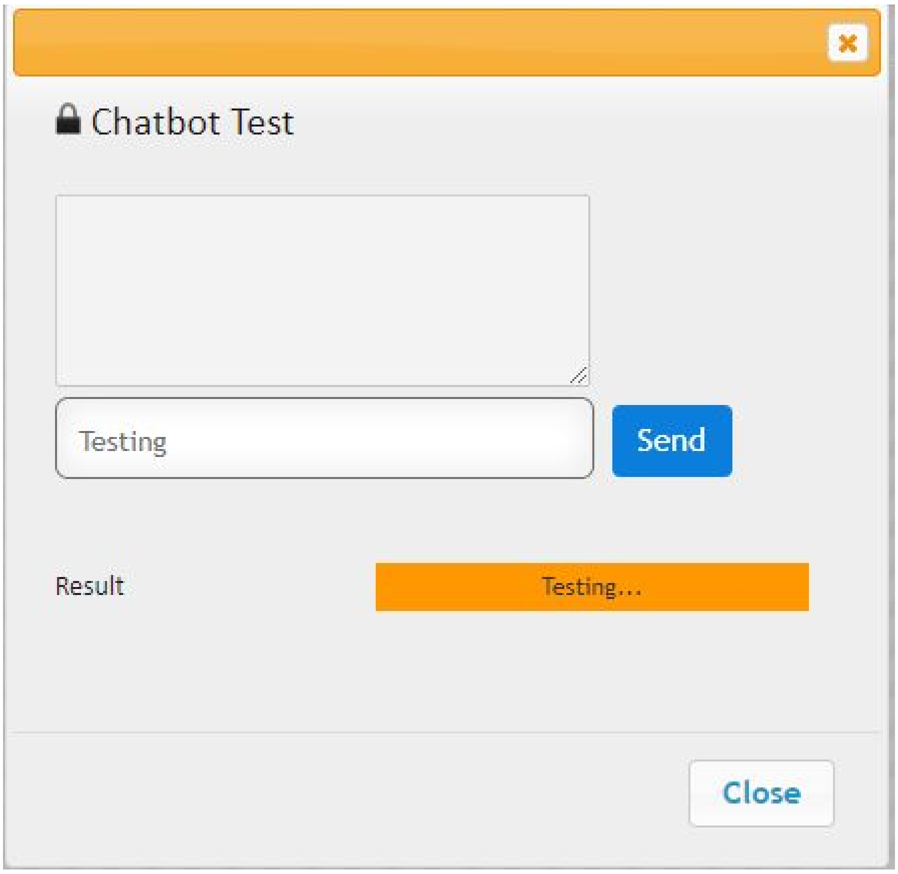
, will confirm the deletion.

2. Confirm the deletion by clicking the "Okay" button, 

.

Testing Chatbot

1. From the chatbot list, click the test button, , for the desired chatbot. When the test button is clicked the following pop-up will appear:



2. What for the result of the test, if positive, the chatbot is ready to use. If negative, please contact Call Center Studio Project Manager for further instructions.

Advanced Settings

The advanced settings section of the administrator module contains advanced settings that the administrator can customize and manage based on organizational preferences. The following section contains the list of advanced settings and the effects they have on the software.

Enter Secondary Mail for Quality Evaluation	Allows the administrator to input more than one email that will receive email notifications regarding agent quality evaluations.
Chat Limit	Assigns a number to the amount of concurrent chats.
Endpoint	The endpoint function is used to generate a deletion token for call recordings. If a deletion is required, please contact your Call Center Studio Project Manager.
Enter Mails for Automated Reports	Automated reports will be sent to the emails imputed here.

Session Timeout Duration	Allows the administrator to input a session timeout duration.
Automatic Log Off Time	Allows administrators to input automatic log off time.
Allow Viewing Active Incoming Call History at Agent Screen	Allows viewing active incoming call history at the agent screen
Agent Based Location	Allows for agent-based location
Allow Agents To Set Reserve Status	Allows agents to set reserve status.
Allow Agents To Download Their Own Voice Records	Allows agents to download their voice records.
Allow Selecting Available Status Without Successful Register	Allows selecting available status without a successful register.
Allow Agent Shortcuts	Allows agent shortcuts
Allow Outgoing Call During Chat	Allows agents to make an outgoing call during a chat.
Allow Agent to Listen Call Record	Allows agents to listen to call recordings.
Allow Supervisors To Change Teams	Allows supervisors to change teams.
Allow Supervisors To Set Reserve Status	Allows supervisors to set reserve status.

Anonymous Evaluation	Allows for anonymous evaluations
Click to Calls Can Only Be Made on The First Line	If the first call is inbound, this disables outbound calls from being made simultaneously.
DNIS ALL	During a crisis, If "ALL" is written in the DNIS input box in the incoming calls section, all the IVRs are changed. This function solves the problem of typing new IVR for all numbers one by one.
Allow Agents To View Reviews Tab And Receive Review Mails	Allows agents to view the reviews tab and receive reviews.
Open Status Limit	To enable status limit durations
Pause Operation	When Selected, pauses the entire operation.
Allow agents to send messages to the desired supervisor.	Allows agents to send messages to the desired supervisor.
Show AHT	This can be used to add inbound operation's AHT data to the report. If outbound operations are present, get in touch with Call Center Studio Team.
Show Custom Variables In Call Evaluation	Displays special variables returned in the

Screen	web service on the evaluation screen
Display Evaluations for Agent older than	Using the dropdown box will display agent evaluations ranging from 1 month, 3 months, 6 months, or ALL.
Tagging Timeout	Removes agent tags after a selected time period from calls using the dropdown box., normally used if repetitive tags are used too frequently.

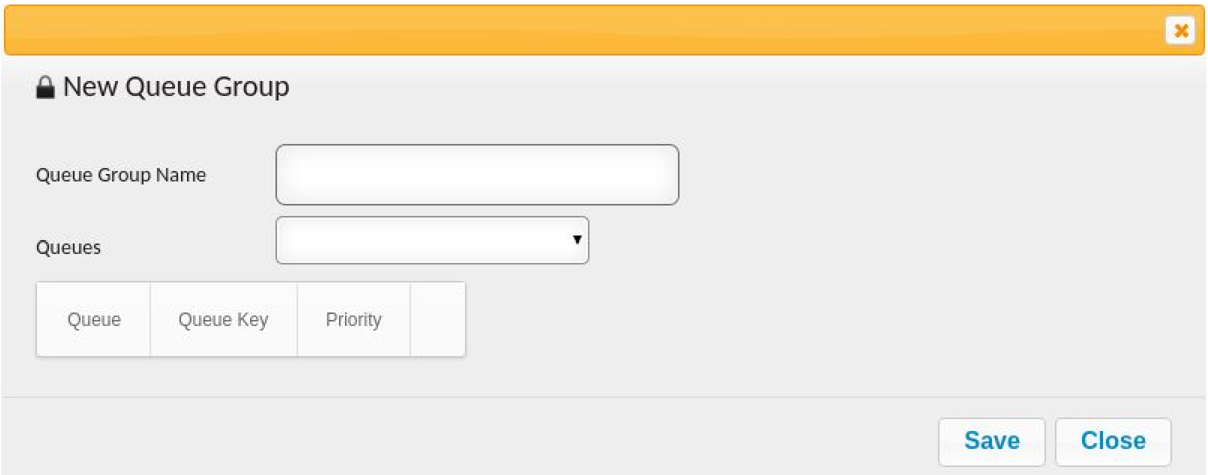
When using search features for the Index titles shown below, case errors can occur. Currently, Call Center Studio is not case sensitive; however, if a case error occurs, the “delete” and “create again” buttons can be used to reset the elastic search features.

Queue Groups

A queue group can be formed to facilitate speed in adding users to multiple queues.

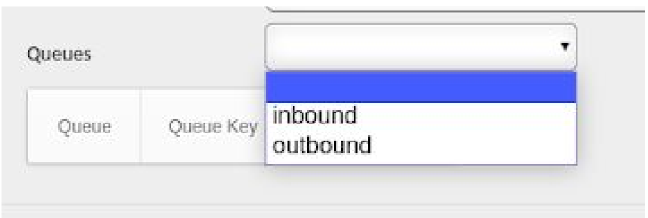
Creating a Queue Group

1. Click the new button, , in the top right corner, the following pop-up screen will appear as shown below:

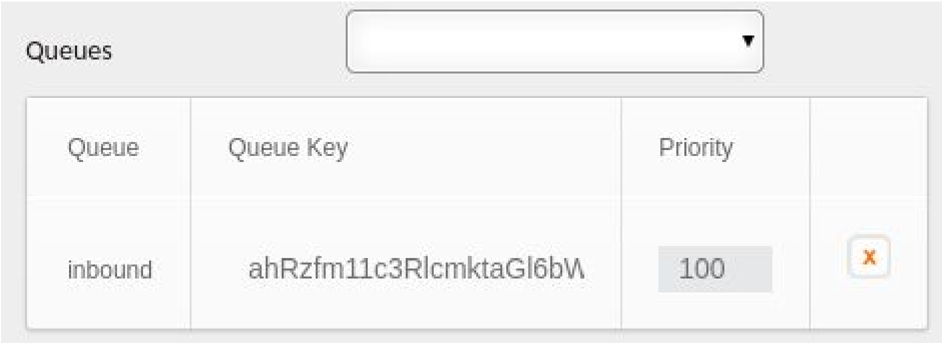


2. Click the "Queue Group Name" input box, type the desired queue group name an example is shown below:

3. Click the "Queues" input box, a dropdown list of created queues will appear (See Queue Section) an example is shown below:

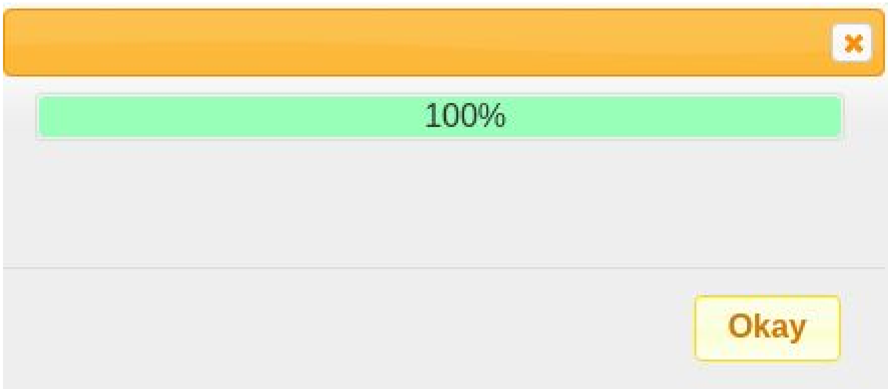


4. Select the desired queue for the Queue Group to be applicable. An example selection is shown below:



Note: The inbound queue was selected. The selection is listed in the table above with the following information: Queue, Queue Key (Automatically generated by the tenant), Priority.

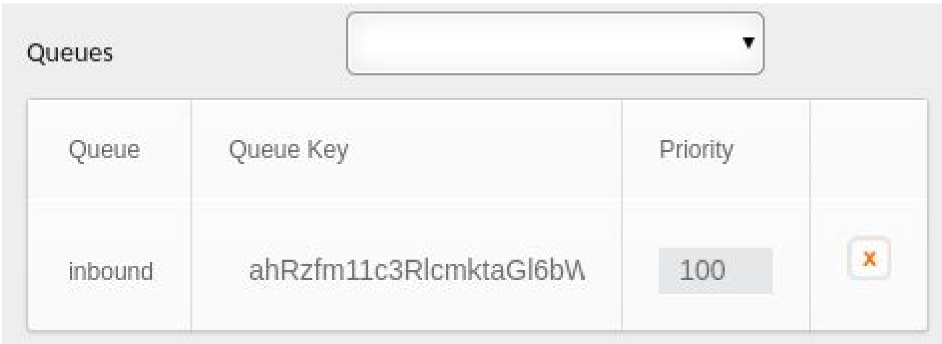
5. After all the desired queues are selected, click the save button, Save, the following pop-up window will be displayed:



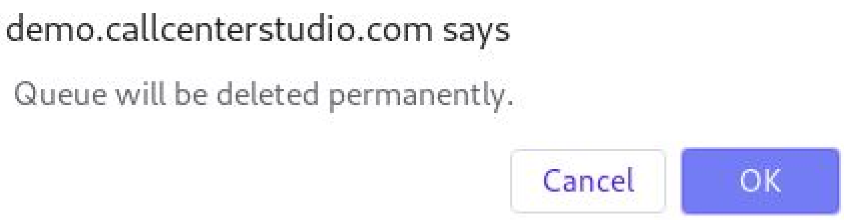
6. Click the Okay button, Okay, the created queue group name will appear in the queue group name list like the created example shown below:

Deleting a Queue from a Queue Group Name

1. If a queue was selected, as shown below:



2. It can be deleted by clicking the delete button, , to the right of the Priority Column, once clicked the following pop-up will be displayed:



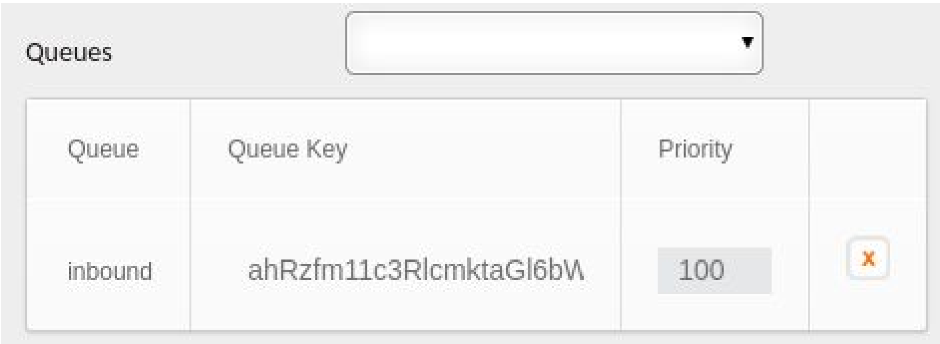
- *Select the cancel button, , to cancel the deletion.*
- *Select the OK button, , to confirm the deletion.*

3. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted queue will not be shown.

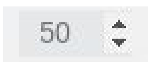
Adjusting priority for a Queue Group Name on a Queue

1. Once a queue is selected, as shown below:



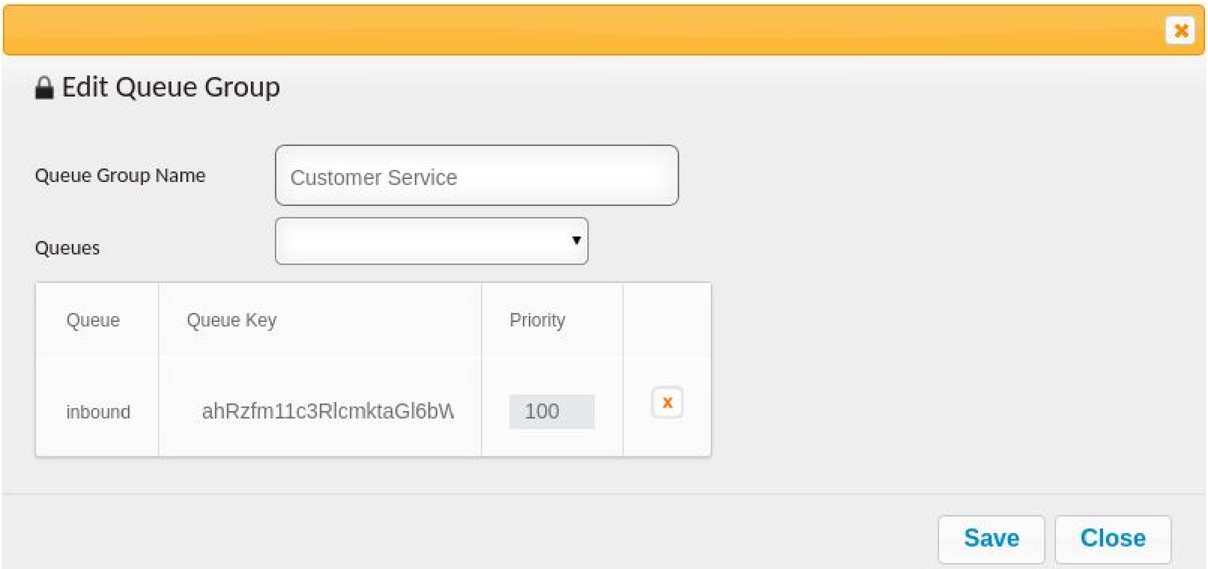
2. Priority can be adjusted based on the Queue Group skills for a specific Queue default is 100 but if the Queue Group is still learning, the priority can be changed to a lower number such as 50 (this is how skill levels can be set) the Priority column contains up and down arrows on the number to adjust the skill level as shown below:

3. Toggle using the arrows until the desired skill level is selected an example is shown below:



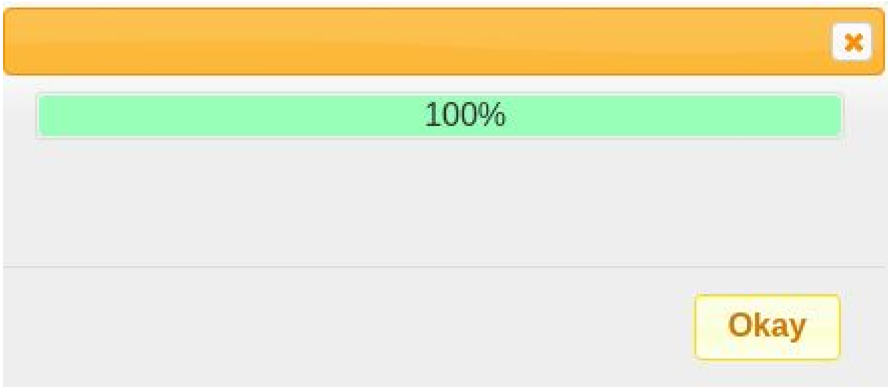
Editing a Queue Group

1. Click the edit button, , located to the right of the queues column, after clicking the following pop-up window will be displayed:



2. Make the desired changes.

3. After all the desired changes are made, click the save button, , the following pop-up window will be displayed:

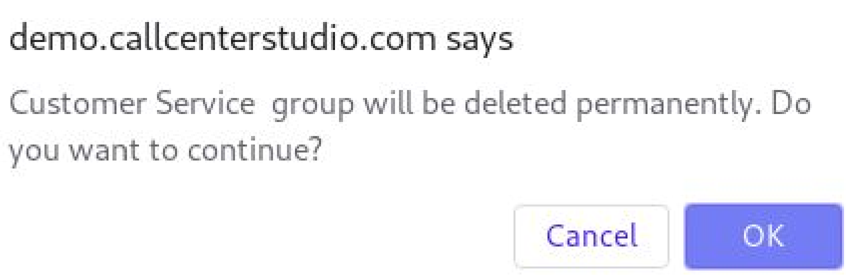


4. Click the Okay button, Okay, the created queue group name will appear in the queue group name list like the created example shown below:

Group Name
Customer Service

Deleting a Queue Group

1. From the Queue Group name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- *Select the cancel button, Cancel, to cancel the deletion.*
- *Select the OK button, OK, to confirm the deletion.*

2. Confirm the deletion by clicking the OK button, OK.

The screen will reload, and the deleted queue group will not be shown.

Searching for a Queue Group

1. Click the “Group Name” input box, type the Group Name, as shown below:

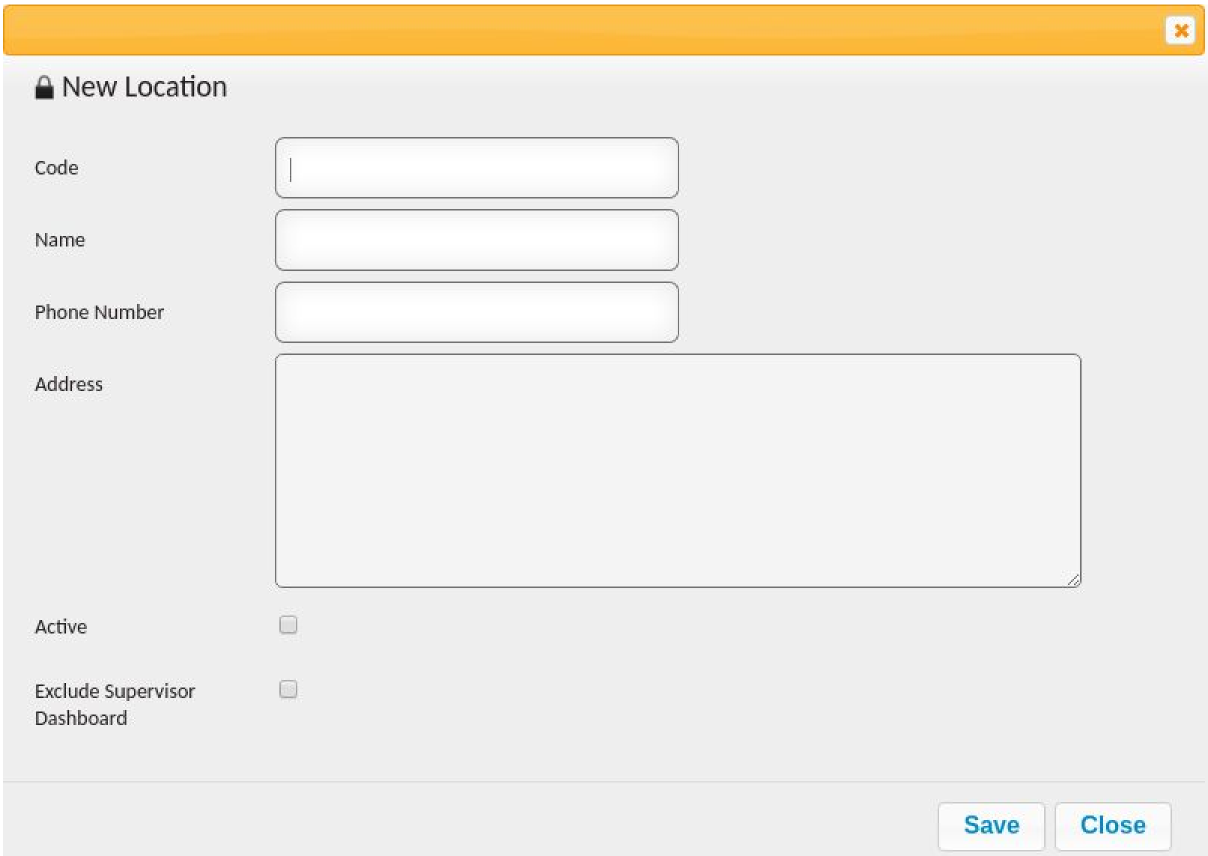
Note: Partial names can be used, when spelled correctly.

Location

Location is used to separate call center operations, using the same tenant. If a location is created and assigned to a queue, only supervisors from that specified location will have access to call records based on their queues assigned location. Typically used to help filter large amounts of call records based on location. It can also be used for outsourcers to separate client records.

Creating a Location

1. Click the new button, , in the top right corner of the screen. The following pop-up screen will appear, as shown below:



2. Click the "Code" input box, type the desired code an example is shown below:

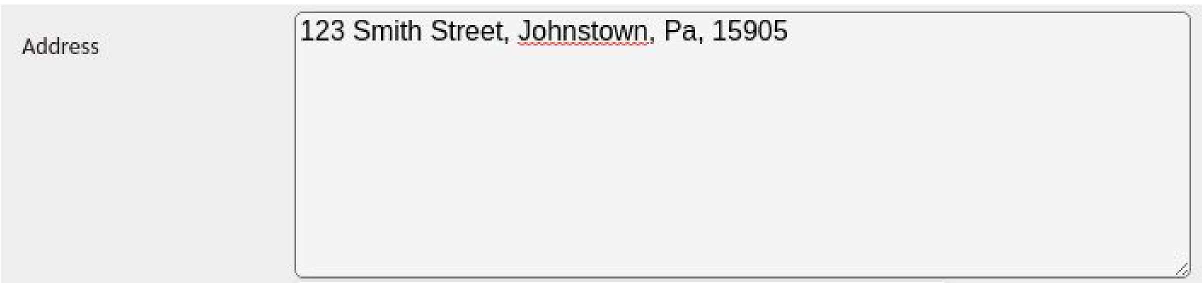
Note: Codes can be numbers or words. Once created, they can be inputted in a queue (See Queues Section for more information).

3. Click the "Name" input box, type the desired name an example is shown below:

4. Click the "Phone Number" input box, type the phone number an example is shown below:

Note: Phone numbers can be added to generate more information based on the location. For example, if a location is based on a specified call center operation, the phone number of the operation can be inputted here.

5. Click the "Address" input box, type the address an example is shown below:



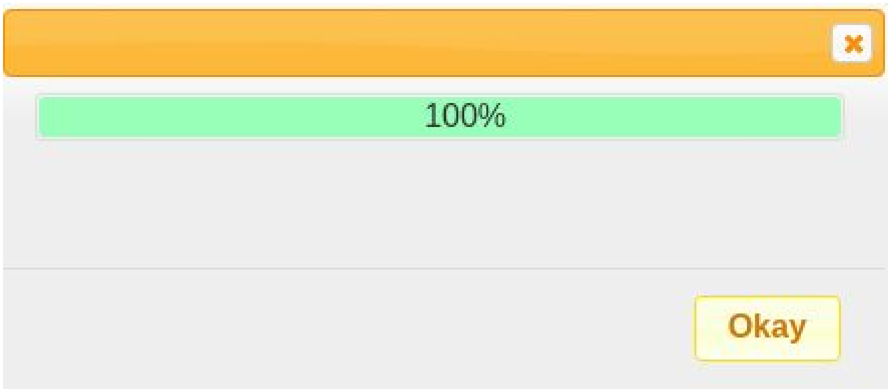
Note: Addresses can be added to generate more information based on the location. For example, if a location is based on a specified call center operation, the address of the operation can be inputted here.

6. After the “Address” input box, there are two checkboxes, select those that apply. Explanations are given below:

Active	For the location code to be used within a queue, the active checkbox needs to be selected.
Exclude Supervisor Dashboard	If the Exclude Supervisor Dashboard checkbox is selected, the supervisor will not be able to view the quality control records from this location.

7. After all location additions have been made, click the save button, 

, the following pop-up window will be displayed:

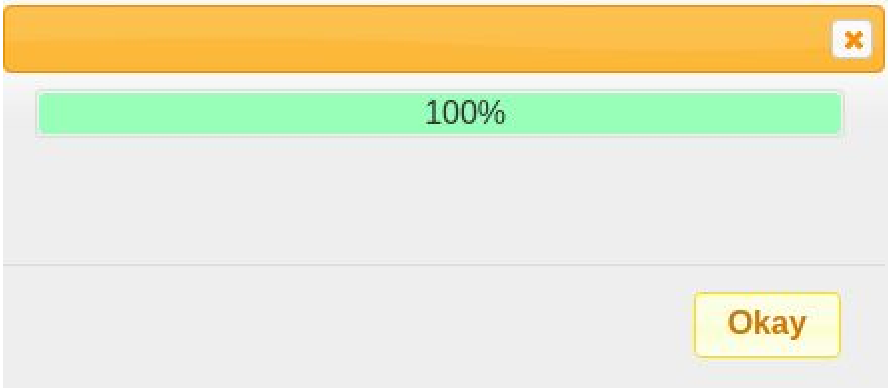


8. Click the Okay button, 

, the created queue group name will appear in the queue group name list.

Editing a Location

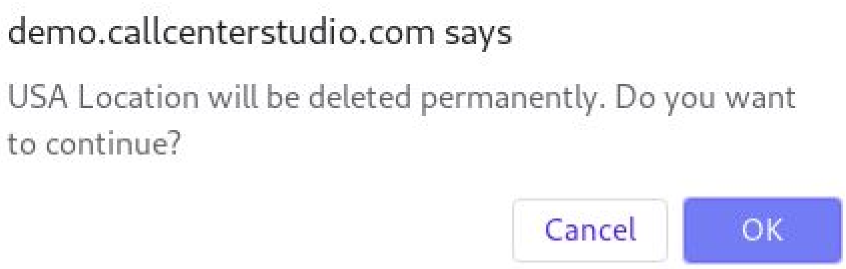
1. Click the edit button, , located to the right of the Exclude Supervisor Dashboard column.
2. Makes changes as desired
3. After all the desired changes are made, click the save button, Save , the following pop-up window will be displayed:



4. Click the Okay button, Okay .

Deleting a Location

1. From the Location name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- *Selecting the cancel button, , will cancel the deletion.*
- *Selecting the OK button, , will confirm the deletion.*

2. Confirm the deletion by clicking the OK button, .

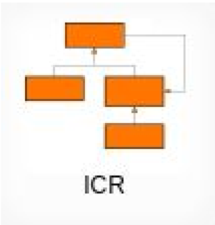
The screen will reload, and the deleted location will not be shown.

Searching for a Location

1. Click the "Name" input box, type the Location name as shown below:

Note: Partial names can be used, when spelled correctly.

ICR



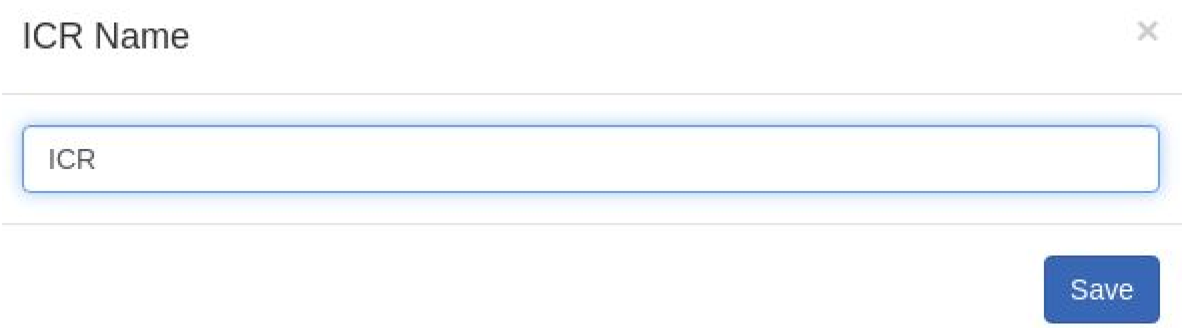
The Interactive Chat Response tab serves a similar function in chats that the Interactive Voice Response serves for phone calls. For example, a chat can be automated and routed to specific chat queues for agents to answer customer questions. Customers can be routed to a conditional chat system that answers consumer questions based on specified inputs.

Creating an ICR

1. Click the "Add ICR" button, 

, in the top right-hand corner of the screen, the following pop-up will appear as shown below:

2. Click the "ICR Name" input box, type the name of the ICR an example is shown below:



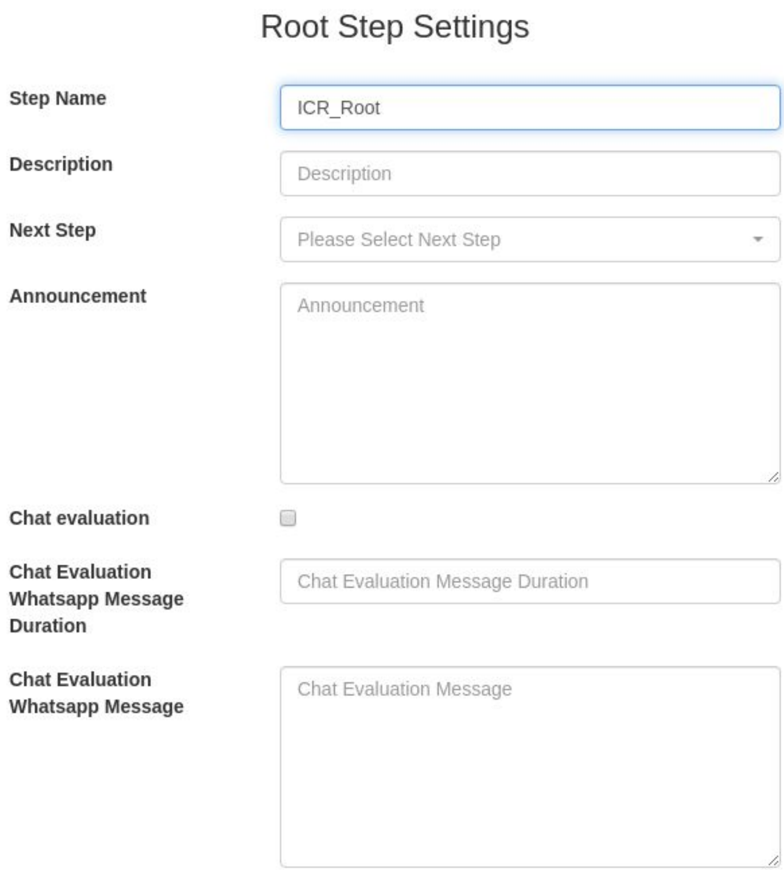
3. Click the “Save” button, 

, the following screen will appear with the name of the created ICR in the top left corner of the screen, as shown below:

Note: This is a partial screenshot of the screen that will appear, notice the name assigned in this example, “ICR,” is located in the top left corner. Also, the first step always follows the same format shown below:

Name assigned to ICR**_Root**

4. Click the “Edit” button for the root step, , located to the right of the Next Step column, after clicking the following pop-up window will be displayed on the right-hand side of the screen:



5. Click the “Step Name” input box, type the desired step name. (Note in all steps if a number is used, the ICR will display the steps in numerical order. For example, 1.ICR_Root)
6. Click the “Description” input box, type the desired description.

7. The “Next Step” dropdown menu can be used to link up the next step. Next Steps can only be linked to previous steps after the step is created. It is recommended to link all steps after setting up the ICR and then linking the steps using the Next Step dropdown box.
8. Click the “Announcement” input box, type the desired announcement.
9. If Chat evaluation is desired, check the “Chat evaluation” checkbox. (used only for WhatsApp & Infobip chat widgets)
10. Select the “Chat Evaluation Whatsapp Message Duration” input box type the desired time duration (Seconds)
11. Select the “Chat Evaluation Whatsapp Message” input box type the desired message.
12. Click the save button, 

.

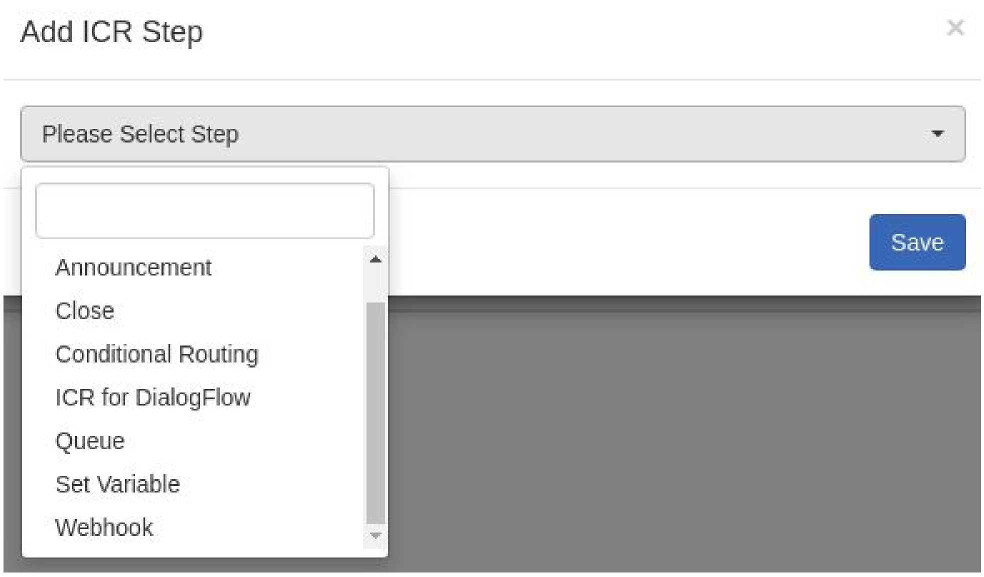
Adding Announcement Step

The announcement step is a message that the customer will receive. It can be used in multiple ways, for example, as the next step in a conditional routing selection.

1. After creating a new ICR, click the "Add ICR Step" button, 

, in the top right-hand corner of the screen, the following pop-up will appear as shown below:

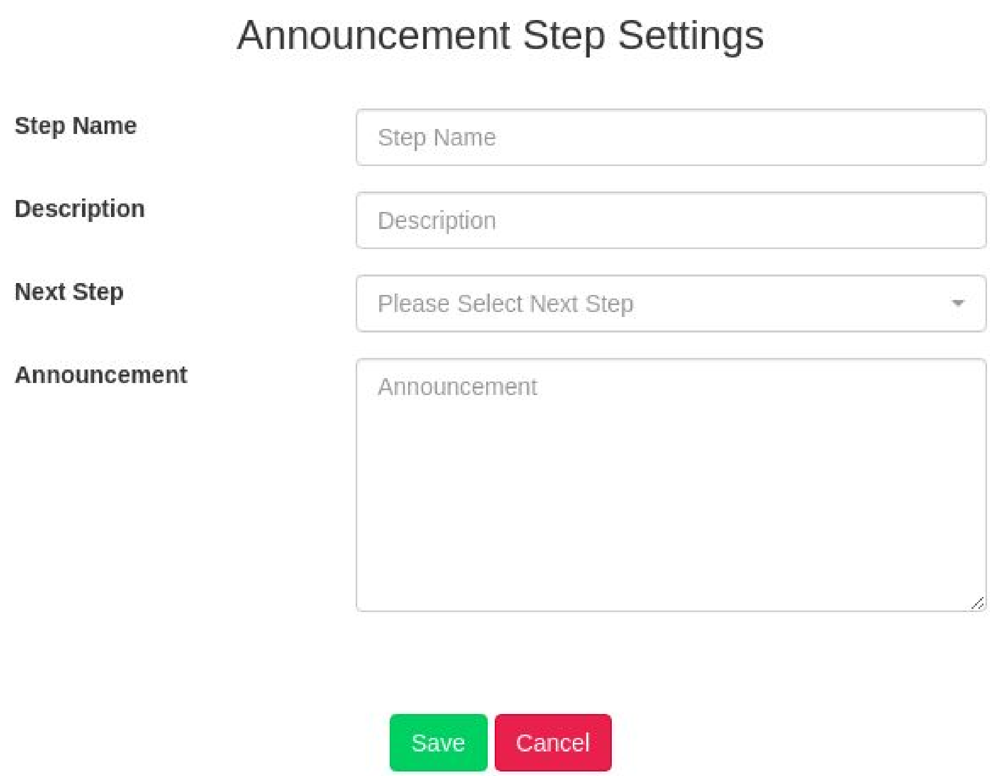
2. Click the "Please Select Step" input box the following dropdown box will appear as shown below:



3. Select the "Announcement" step from the dropdown list; an example selection is shown below:

4. Click the Save button, 

, the following will appear on the right-hand side of the screen:



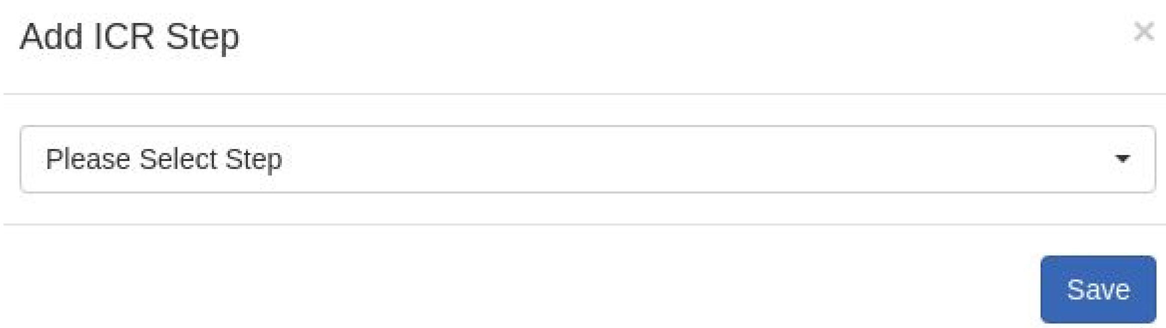
5. Click the “Step Name” input box, type the desired step name.
6. Click the “Description” input box, type the desired description.
7. The “Next Step” dropdown menu can be used to link up the next step. Next steps can only be linked to previous steps after the step is created. It is recommended to link all steps after setting up the IVR and then linking the steps using the Next Step dropdown box.
8. Click the “Announcement” input box, type the desired announcement.
9. Click the “Save” button, 

.

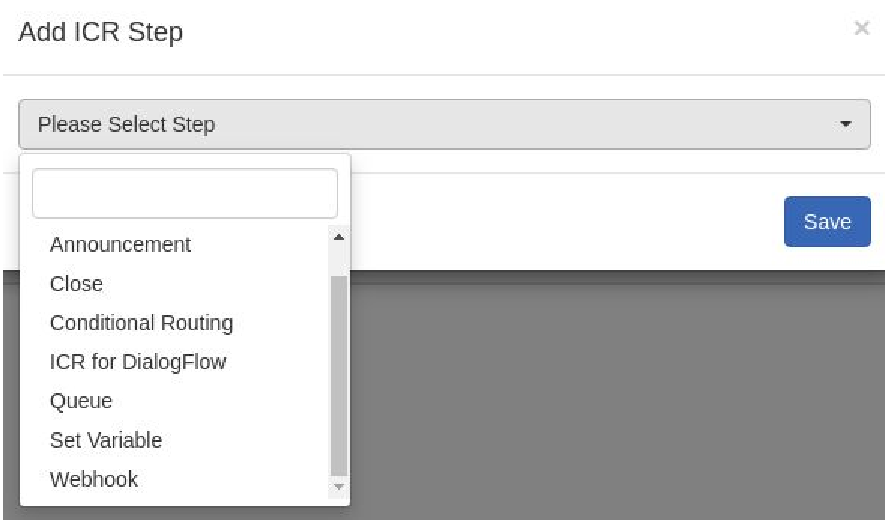
Adding Close Step

1. After creating a new ICR, click the “Add ICR” Step button, 

, in the top right-hand corner of the screen, the following pop-up will appear as shown below:



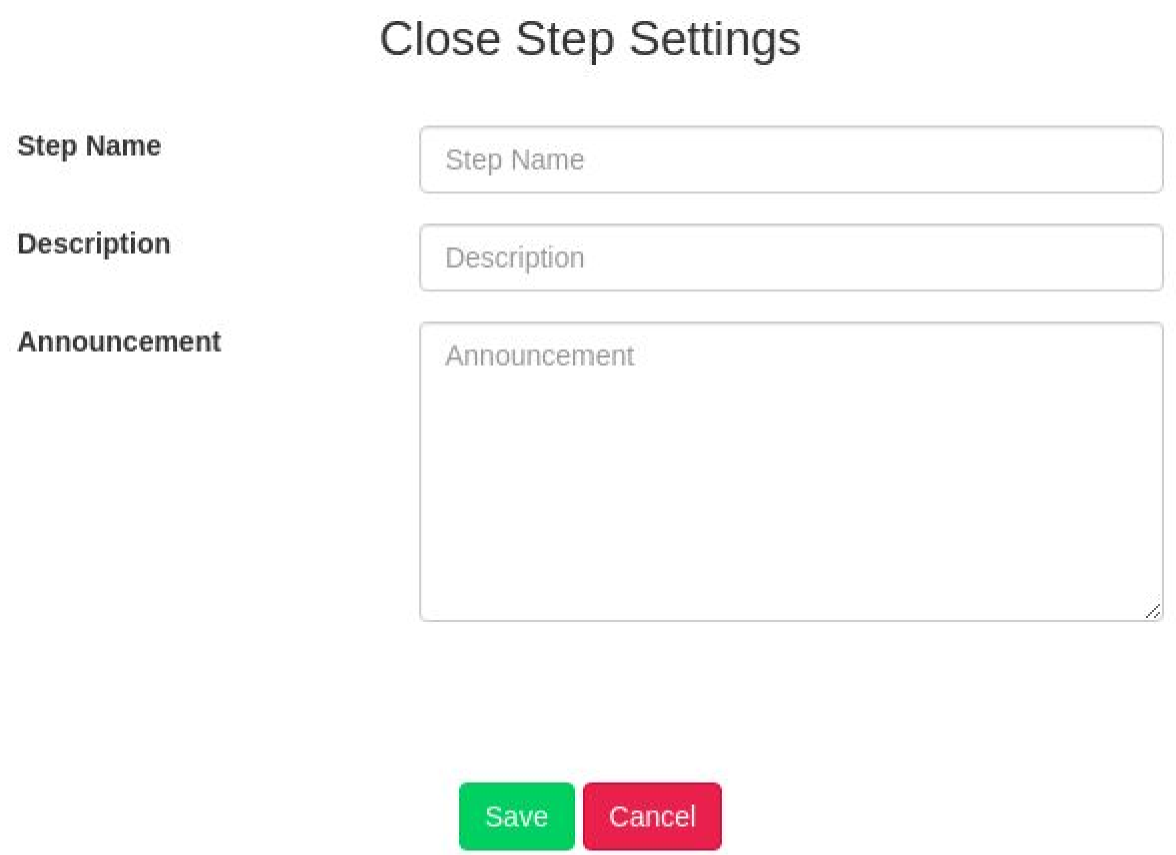
2. Click the “Please Select Step” input box the following dropdown box will appear as shown below:



3. Select the “Close” step from the dropdown list; an example selection is shown below:

4. Click the “Save” button, 

, the following will appear on the right-hand side of the screen:



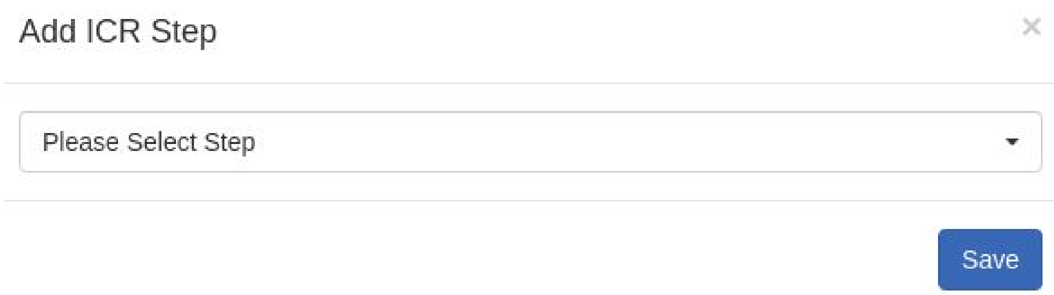
5. Click the “Step Name” input box, type the desired step name.
6. Click the “Description” input box, type the desired description.
7. Click the “Announcement” input box, type the desired announcement, the customer will see before the chat closes.
8. Click the “Save” button, Save .

Adding Conditional Routing Step

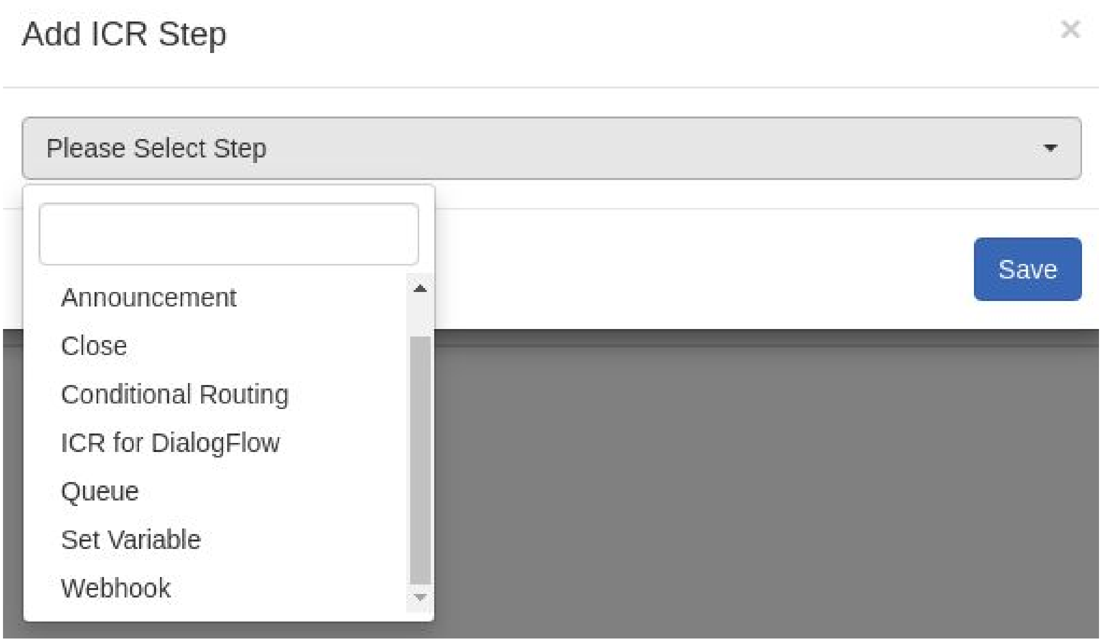
The conditional routing step allows the customer to make selections based on built-in conditions (Note: usually, a variable step is created before the conditional formatting step).

1. After creating a new ICR, click the “Add ICR Step” button, 

, in the top right-hand corner of the screen, the following pop-up will appear as shown below:



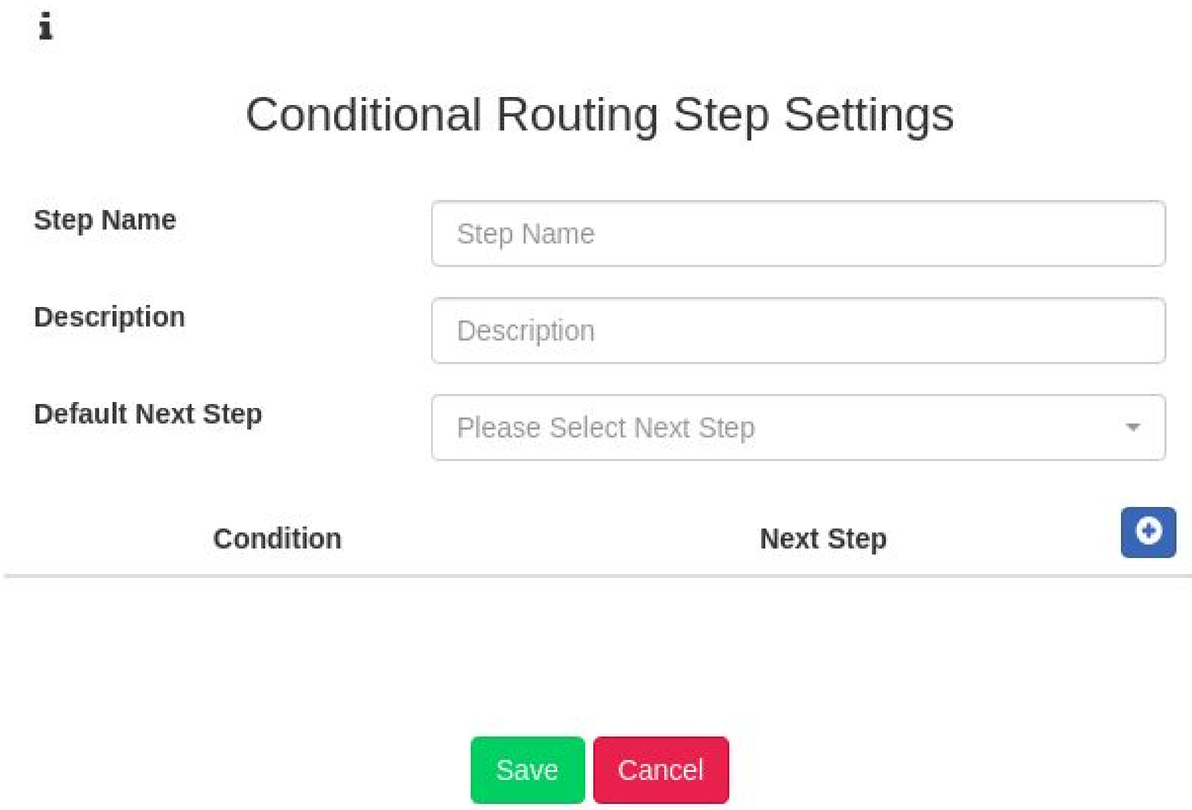
2. Click the “Please Select Step” input box the following dropdown box will appear as shown below:



3. Select the “Conditional Routing” step from the dropdown list; an example selection is shown below:

4. Click the “Save” button, 

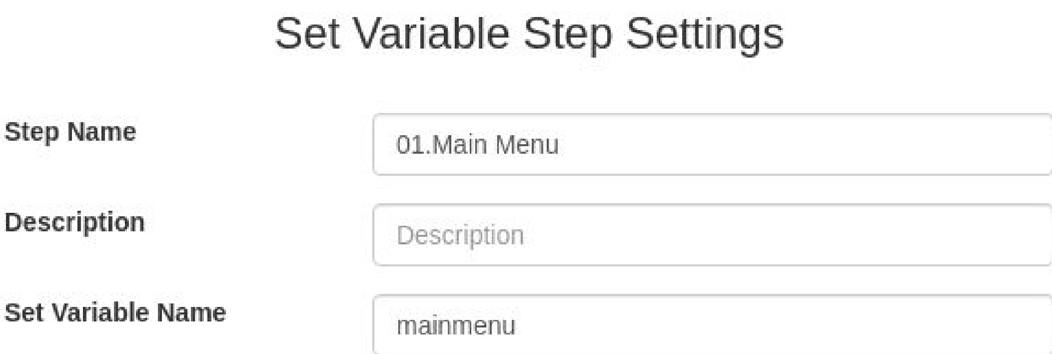
, the following will appear on the right-hand side of the screen:



5. Click the "Step Name" input box, type the desired step name.
6. Click the "Description" input box, type the desired description.
7. The "Default Next Step" dropdown menu can be used to link up the next step. Next steps can only be linked to previous steps after the step is created. It is recommended to link all steps after setting up the IVR and then linking the steps using the Next Step dropdown box. (For conditional routing a default next step is not necessary)
8. Click the "New Step" button,  the following will appear:

9. The "Condition Name" input box is a formula based on the customer's response. An example is shown below:

Note: This conditional formatting formula is based on the variable "mainmenu" created in a variable step, as shown below:



Note: See Variable Step Section for creating a variable step. In this step, if the customer inputs the number "1," the customer will be transferred to step defined below:

10. Click the dropdown menu under the “Condition Name” input box. (Note: Normally this is done after all the steps are completed, to link the conditional routing with the next steps). An example is shown below:

Note: In this example, if the customer inputs “1” then, the customer will be transferred to “02.Enter the Credit amount” step.

11. Repeat steps 8-10 until the desired amount of conditional formatting steps is reached.

12. Click the save button, 

.

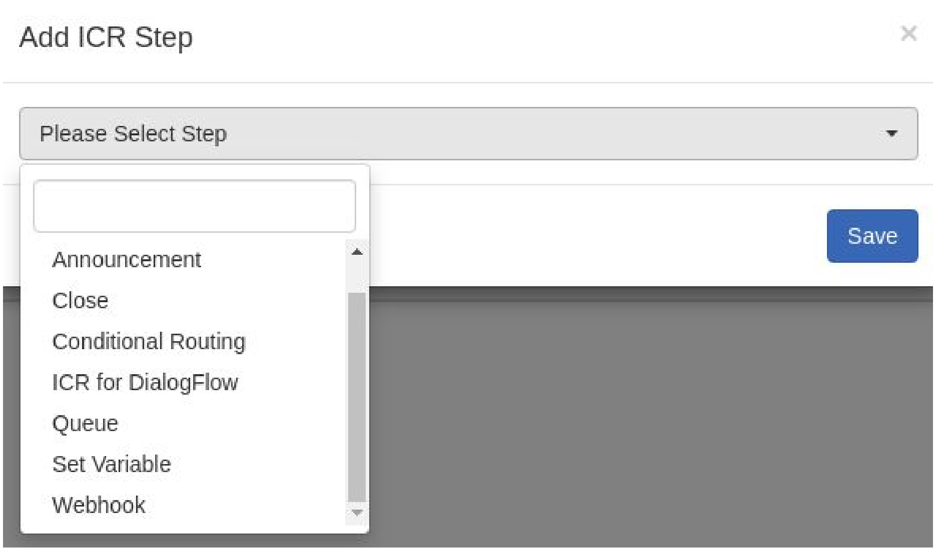
Adding ICR DialogFlow Step

A chatbot can be created using Google Dialogflow. By creating this step, the desired language of the dialog flow can be used by the customer for ease of communication with the agent. Google Dialogflow transmits the conversation's responses into each user's preferred language.

1. After creating a new ICR, click the "Add ICR Step" button, 

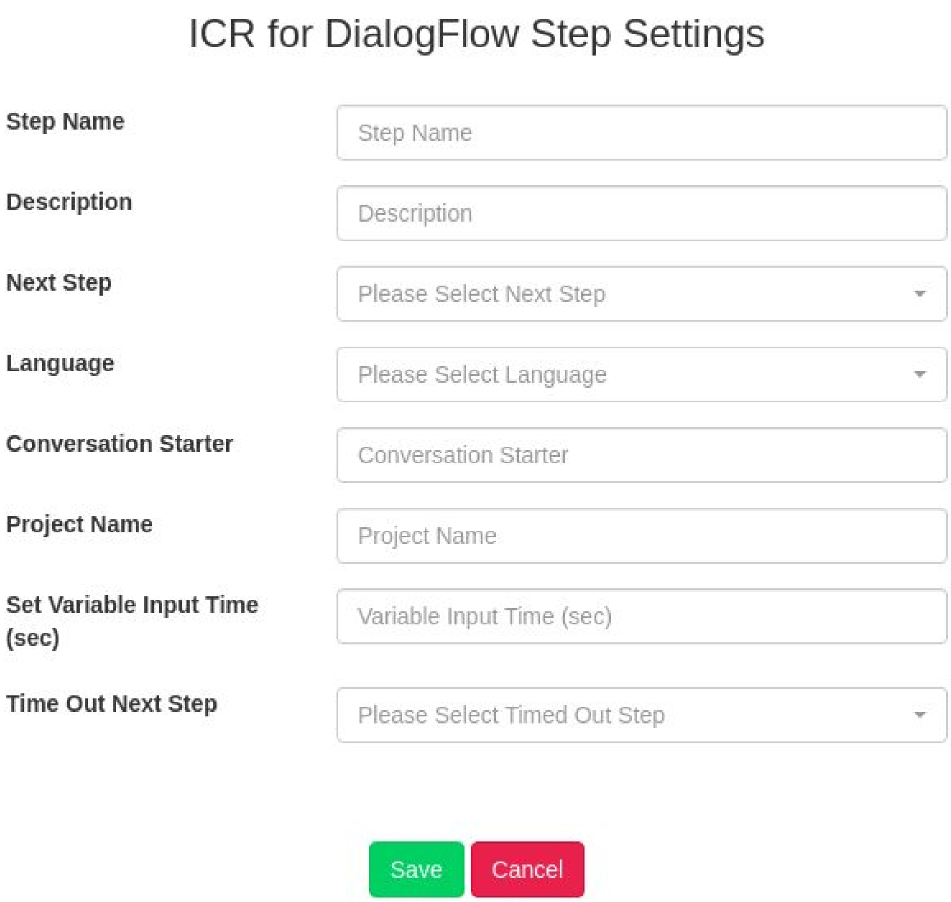
, in the top right-hand corner of the screen, the following pop-up will appear as shown below:

2. Click the "Please Select Step" input box the following dropdown box will appear as shown below:



3. Select the "ICR for DialogFlow" step from the dropdown list; an example selection is shown below:

4. Click the "Save" button, , the following will appear on the right-hand side of the screen:



5. Click the “Step Name” input box, type the desired step name.
6. Click the “Description” input box, type the desired description.
7. The “Next Step” dropdown menu can be used to link up the next step. Next steps can only be linked to previous steps after the step is created. It is recommended to link all steps after setting up the IVR and then linking the steps using the Next Step dropdown box.
8. Click the “Language” dropdown menu, select the desired language.
9. Click the “Conversation Starter” input box, type the desired conversation starter. It is the first sentence the customer sends to the chat.

Note: For a generic string to trigger the Dialogflow type: $initial_message

10. Click the “Project Name” input box, type the desired project name. (ID of the dialog flow project opened on behalf of the customer in Google Cloud Platform.) (Contact the assigned Call Center Studio Project Manager for the Project Name.)
11. Click the “Set Variable Input Time (sec)” input box, type the desired timeout period.
12. The “Time Out Next Step” dropdown menu can be used to link up the next step. Next steps can only be linked to previous steps after the step is created. It is recommended to link all steps after setting up the IVR and then linking the steps using the Next Step dropdown box.
13. Click the “Save” button, 

.

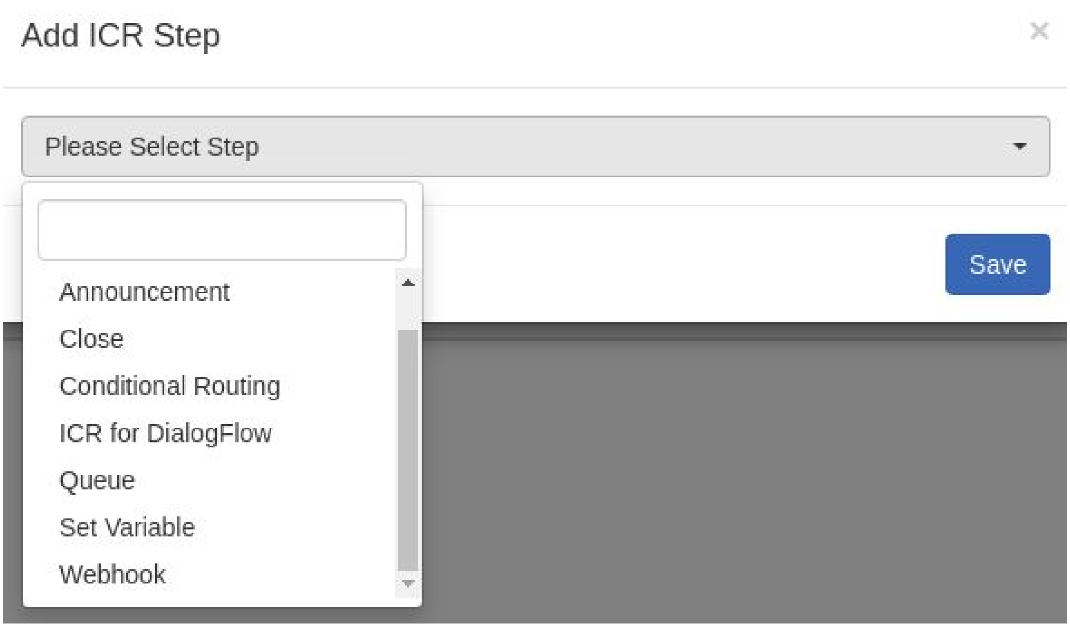
Adding Queue Step

The queue step is used to connect a customer with the appropriate chat queue. (Note: it can be used after a conditional routing step to send the customer to the appropriate chat queue).

1. After creating a new ICR, click the "Add ICR Step" button, 

, in the top right-hand corner of the screen, the following pop-up will appear as shown below:

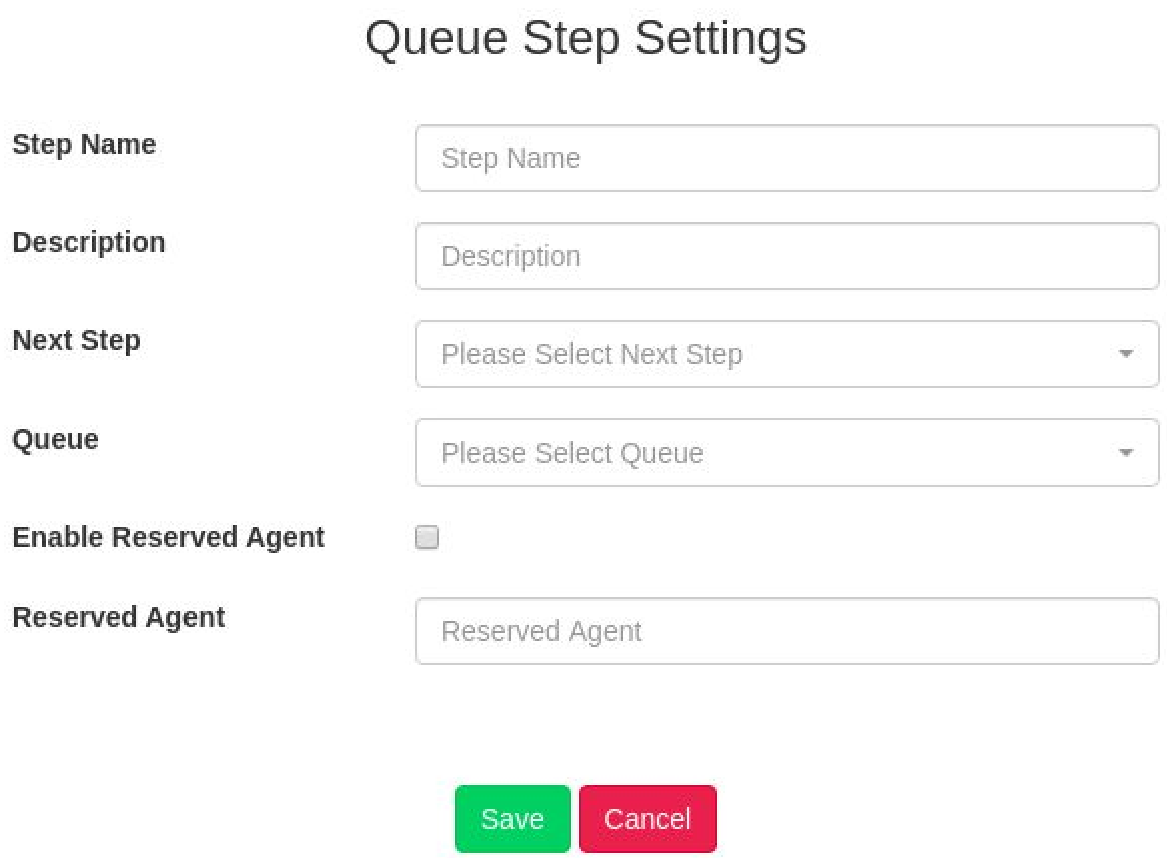
2. Click the "Please Select Step" input box the following dropdown box will appear as shown below:



3. Select the "Queue" step from the dropdown list, an example selection is shown below:

4. Click the "Save" button, 

, the following will appear on the right-hand side of the screen:



5. Click the "Step Name" input box, type the desired step name.
6. Click the "Description" input box, type the desired description.
7. The "Next Step" dropdown menu can be used to link up the next step. Next steps can only be linked to previous steps after the step is created. It is recommended to link all steps after setting up the IVR and then linking the steps using the Next Step dropdown box.
8. Click the "Queue" dropdown menu, select the desired chat queue.
9. A reserve agent can be enabled if desired by checking the "Enable Reserved Agent" Checkbox.
10. If the "Enable Reserved Agent" checkbox is selected, type the reserve agent's name.
11. Click the "Save" button, 

.

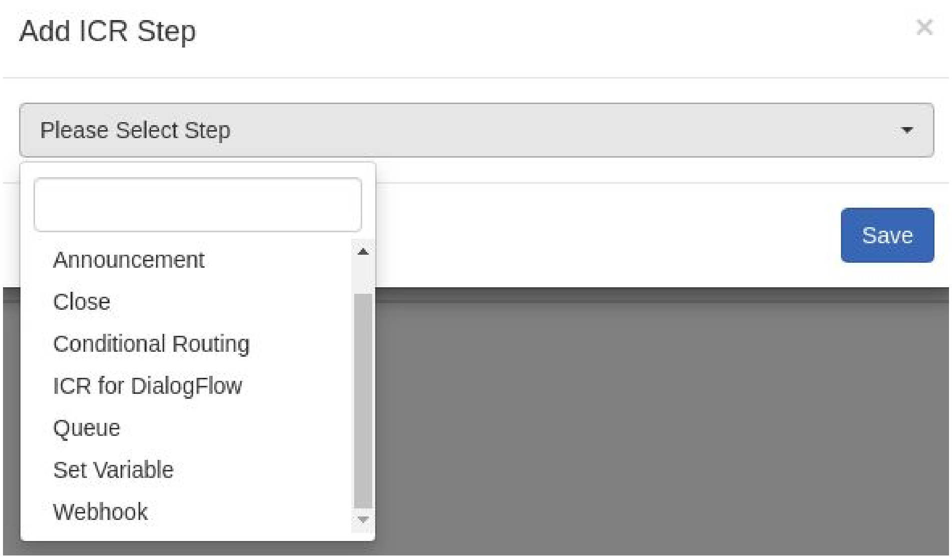
Adding Out of Working Hours Step

Out of working hours, steps can be used within an ICR to notify the customer that they cannot be transferred to a live agent because it is not within working hours. This step can be used instead of creating time constraints within the Incoming Chat section.

1. After creating a new ICR, click the "Add ICR Step" button, 

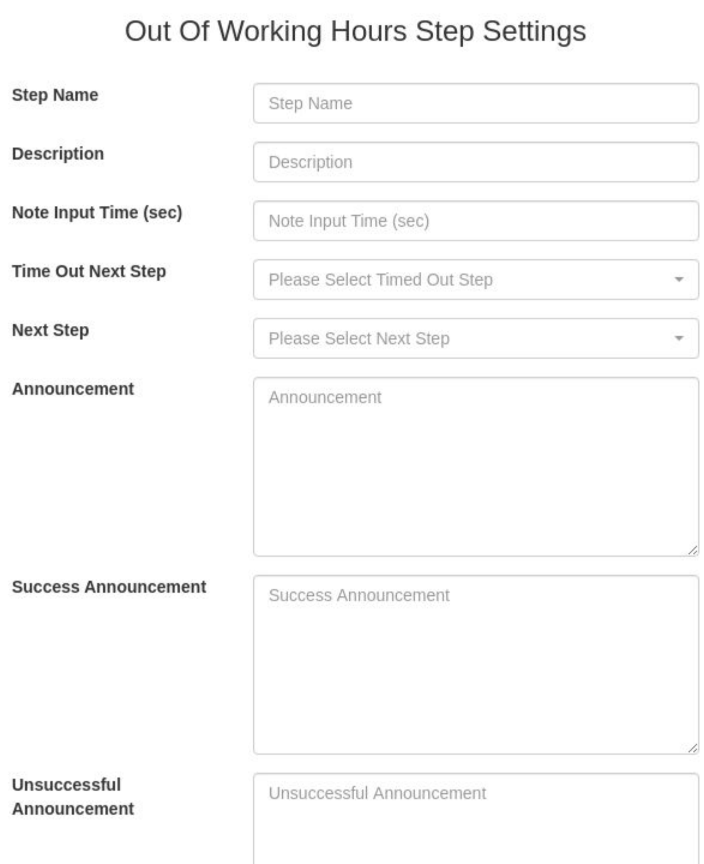
, in the top right-hand corner of the screen, the following pop-up will appear as shown below:

2. Click the "Please Select Step" input box the following dropdown box will appear as shown below:



3. Select the "Out of Working Hours" step from the dropdown list; an example selection is shown below:

4. Click the "Save" button, , the following will appear on the right-hand side of the screen:



Note: The entire selection is not shown. The scroll bar needs to be used to view all the inputs.

5. Click the “Step Name” input box, type the desired step name.
6. Click the “Description” input box, type the desired description.
7. Click the “Note Input Time (sec.)” input box, type the desired note timeout.
8. Click the “Time Out Next Step” input box, select from the dropdown menu the desired next step (Note: Previous steps can also be used to show the customer the variable selection again on ICR)
9. Click the “Announcement” input box, type the desired announcement.
10. Click the “Successful Announcement” input box, type the desired announcement.
11. Click the “Unsuccessful Announcement” input box, type the desired announcement.
12. Click the “Information Email Address” input box, type the desired email address.
13. Click the “Tag” dropdown box, select the desired tags.
14. Click the “Save” button, 

.

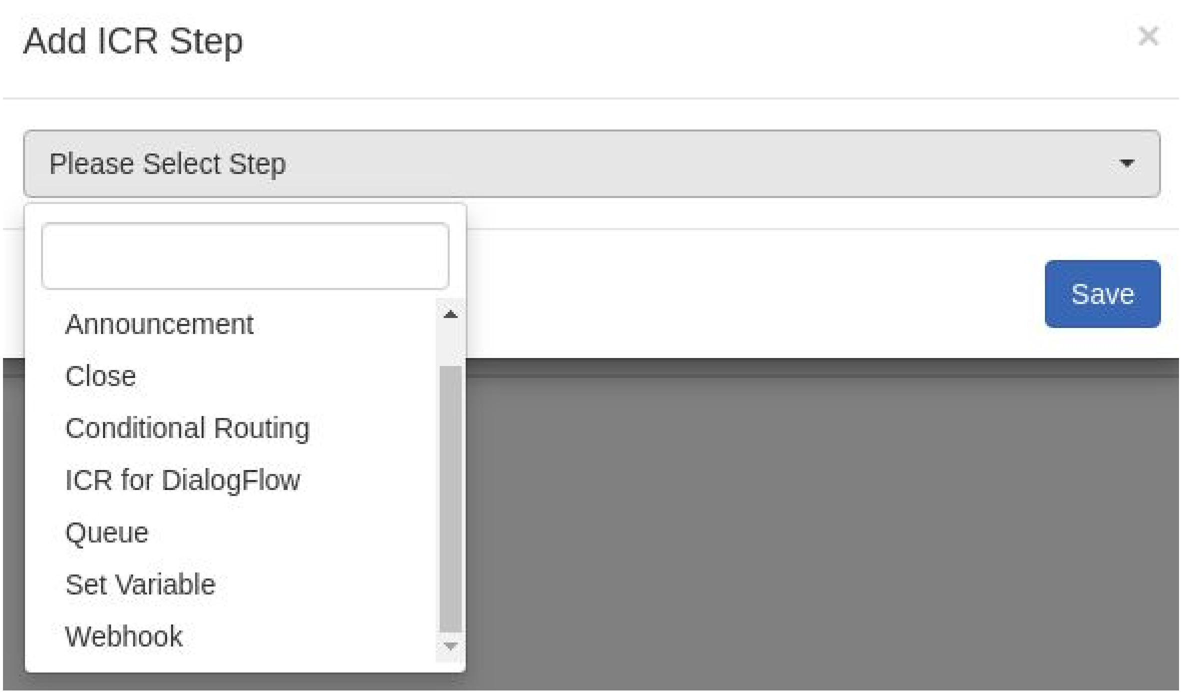
Adding Set Variable Step

The set variable step is used to create variables for conditional routing.

1. After creating a new ICR, click the "Add ICR Step" button, 

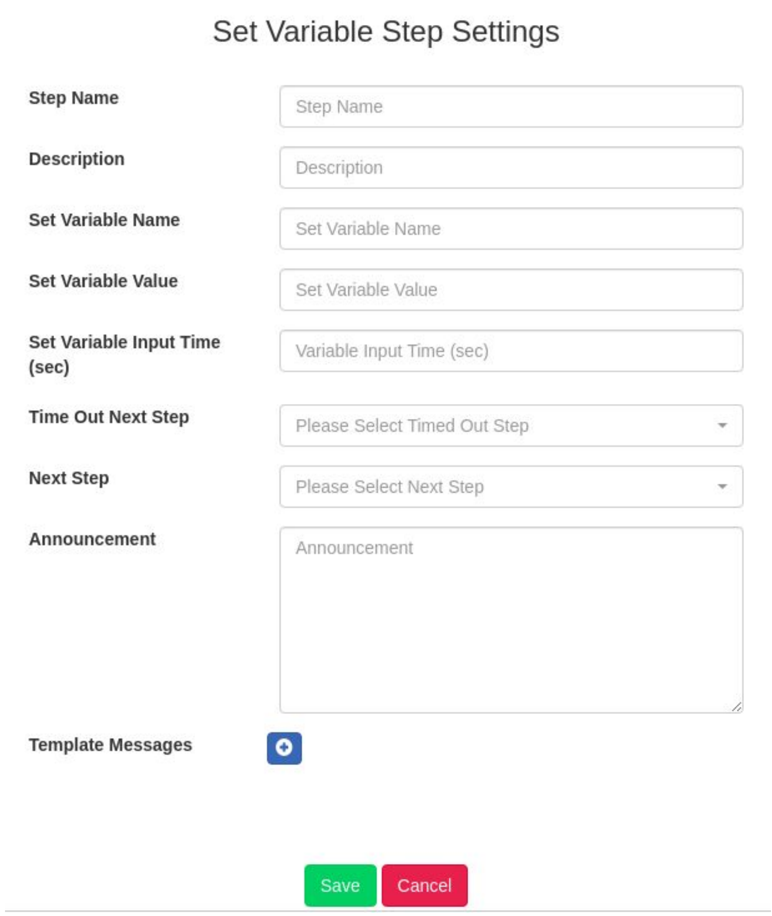
, in the top right-hand corner of the screen, the following pop-up will appear as shown below:

2. Click the "Please Select Step" input box the following dropdown box will appear as shown below:

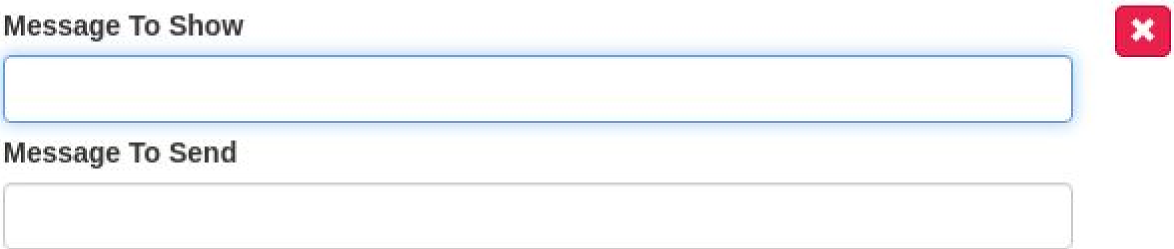


3. Select the “Set Variable” step from the dropdown list; an example selection is shown below:

4. Click the “Save” button,  , the following will appear on the right-hand side of the screen:



5. Click the “Step Name” input box, type the desired step name.
6. Click the “Description” input box, type the desired description.
7. Click the “Set Variable Name” input box, type the desired variable name.
8. Click the “Set Variable Input Time (Sec)” (Used as time out period for variable inputs on conditional routing step), type the desired length of time for the timeout (sec).
9. Click the “Time Out Next Step” input box, select from the dropdown menu the desired next step (Note: The previous step can also be used to show the customer the variable selection again on ICR)
10. Click the “Announcement” input box, type the desired announcement (Normally the variable list used in the conditional routing step).
11. Template messages can be added by clicking the “Plus” button , the following screen will be displayed:



12. When finished, click the “Save” button, 

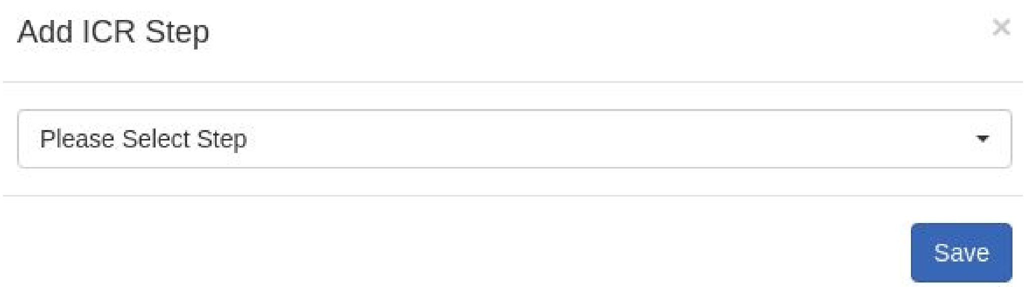
.

Adding Webhook Step

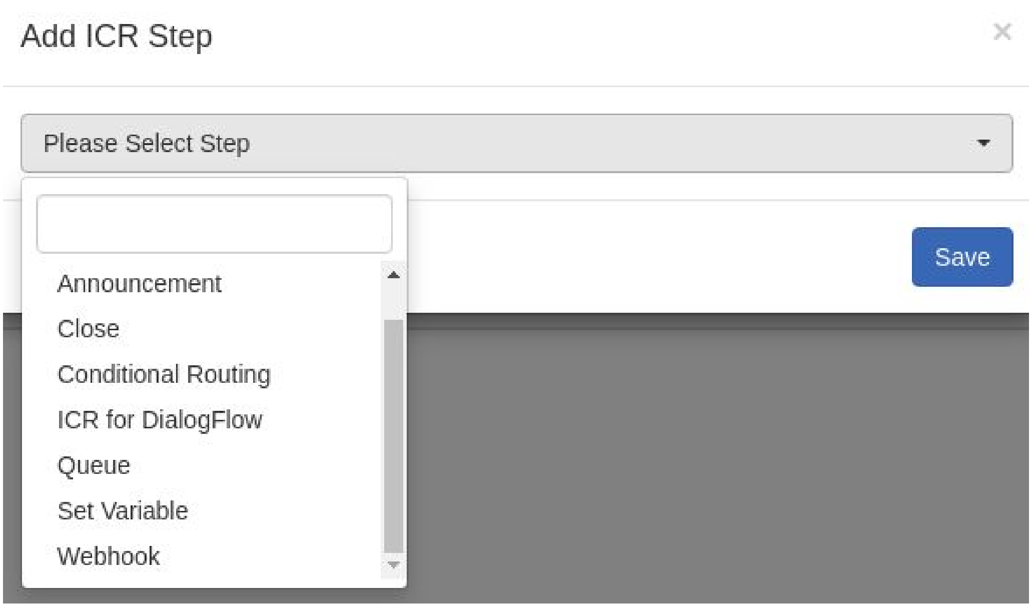
The webhook step is used for sending information to, or for receiving information from a web service.

1. After creating a new ICR, click the “Add ICR Step” button, 

, in the top right-hand corner of the screen, the following pop-up will appear as shown below:



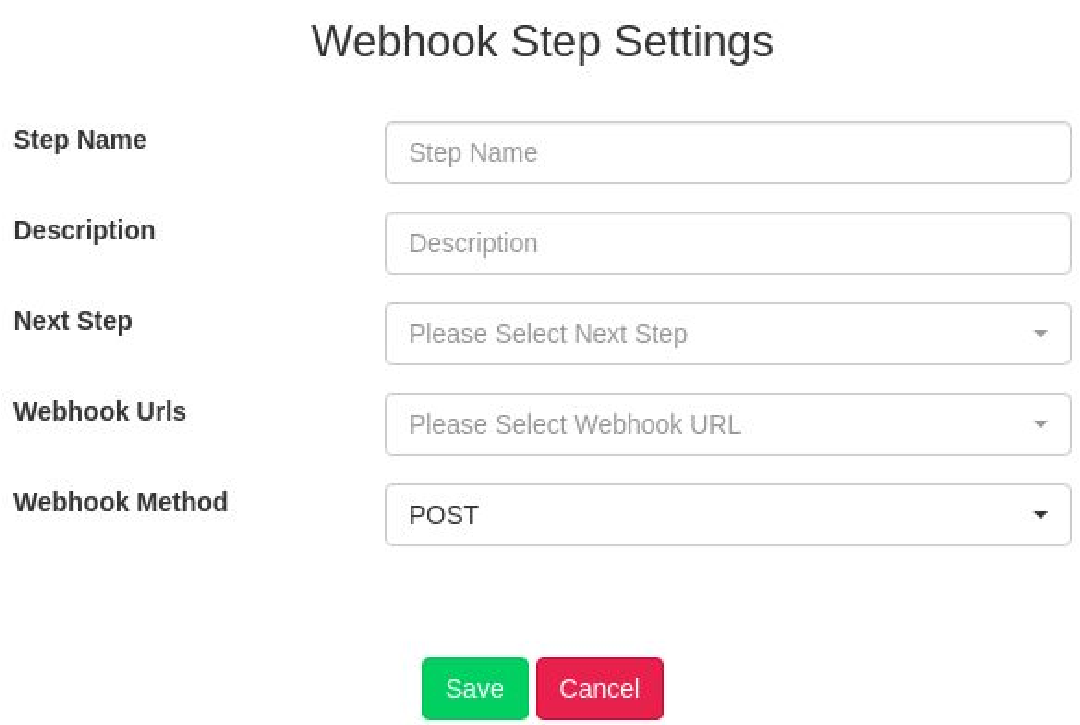
2. Click the “Please Select Step” input box the following dropdown box will appear as shown below:



3. Select the "Webhook" step from the dropdown list; an example selection is shown below:

4. Click the Save button, 

, the following will appear on the right-hand side of the screen:



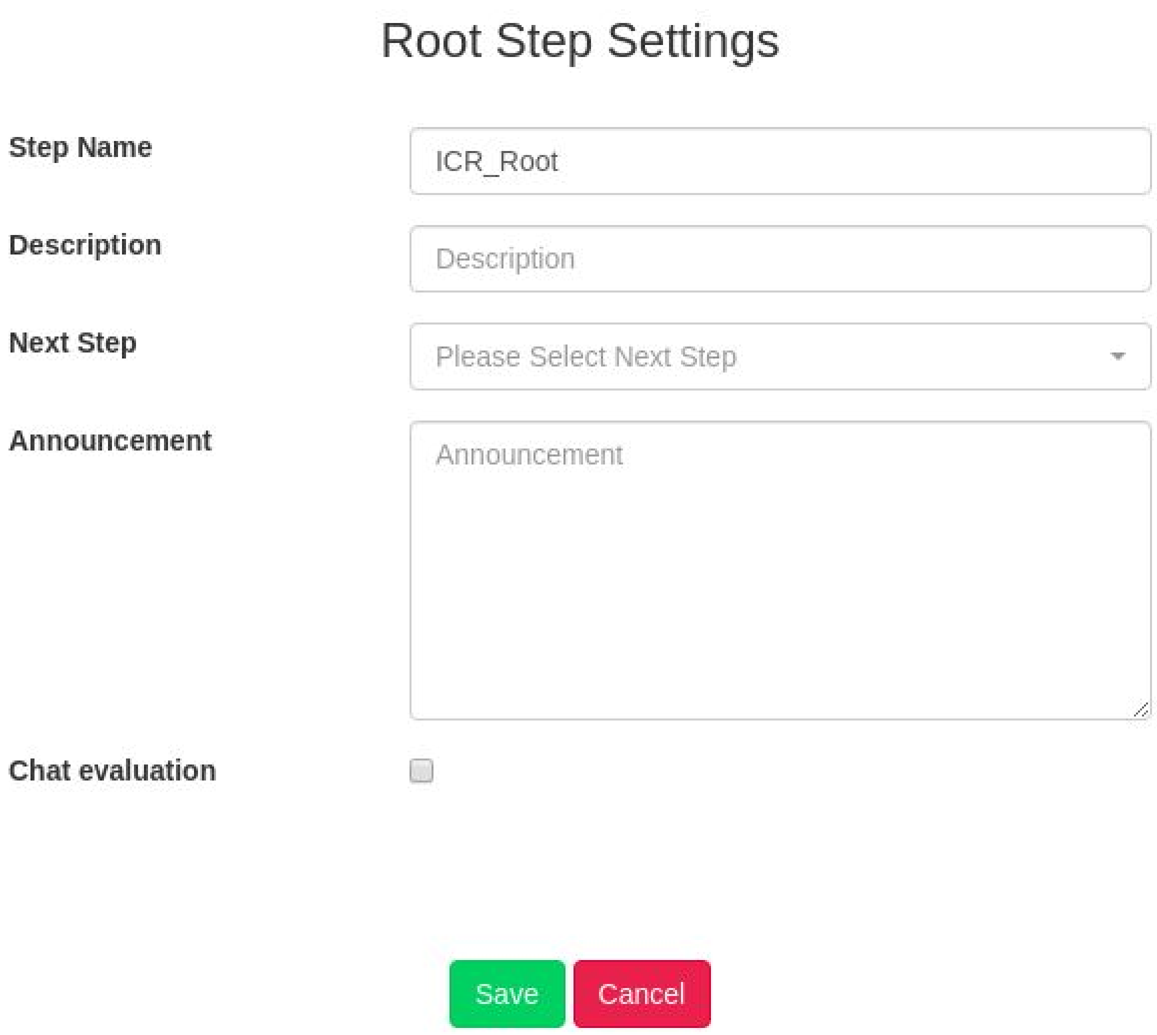
5. Click the "Step Name" input box, type the desired step name.
6. Click the "Description" input box, type the desired description.

7. Click the “Webhook Urls” dropdown menu, select the desired Webhook URL (Note: Webhook URls are created in the Web URLs section, See Web URls for creating a Web URL or talk to the assigned Call Center Studio Project Manager.)
8. Select the desired “Webhook Method” from the dropdown box.
9. When finished, click the “Save” button, 

.

Editing ICR Step

1. Click the edit button, , located to the right of the "Next Step" a pop-up window will be displayed according to the step type, an example edit for the root step is shown below:

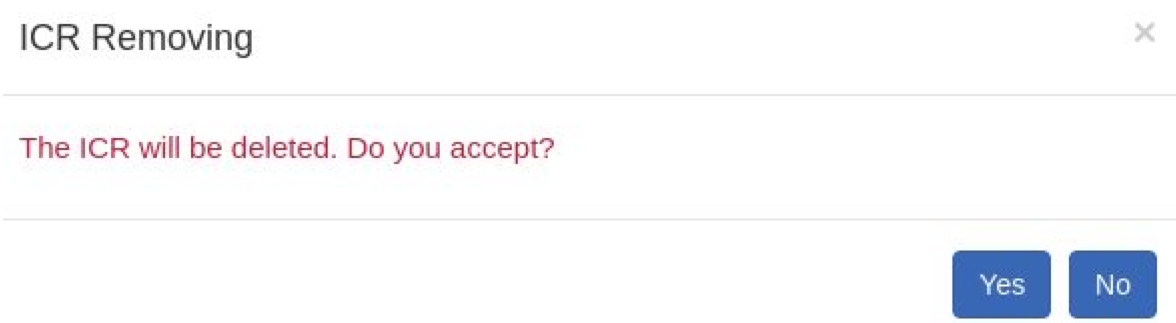


2. Make desired changes (See Adding steps for more information)

3. Click the Save button, Save.

Deleting ICR Step

1. From the ICR name list, click the remove button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- *Selecting the "No" button, , will cancel the deletion.*
- *Selecting the "Yes" button, , will confirm the deletion.*

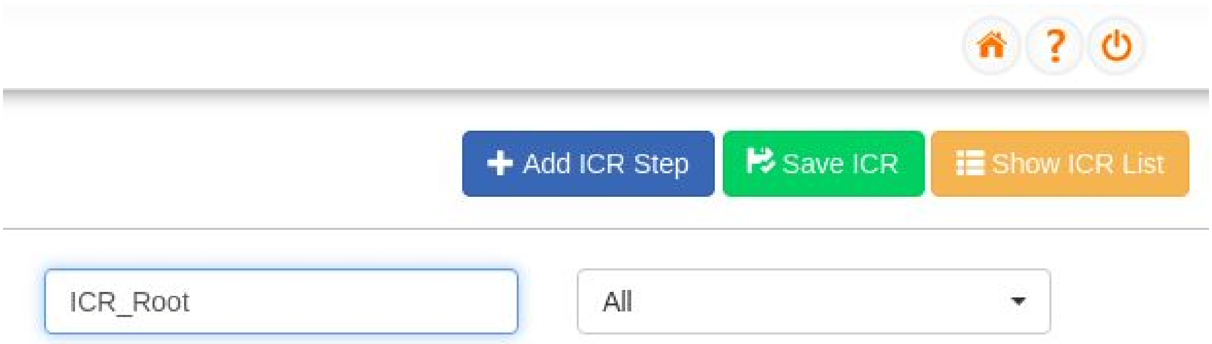
2. Confirm the deletion by clicking the "Yes" button, .

The screen will reload, and the deleted ICR step will not be shown.

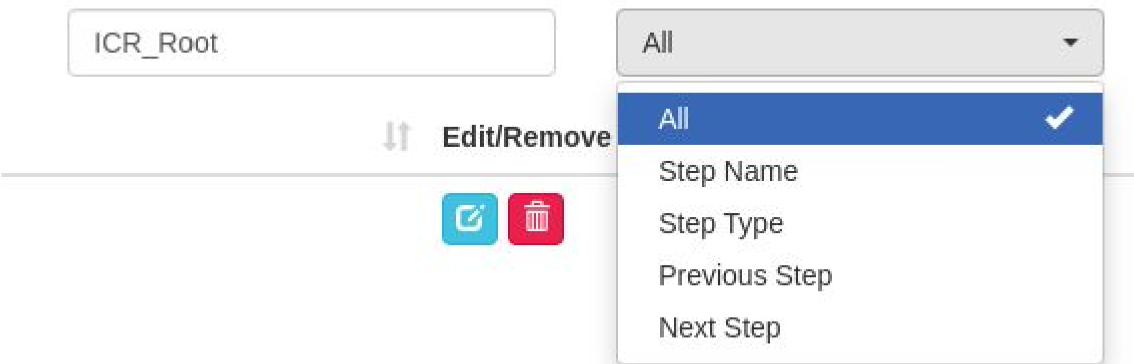
Searching for an ICR Step

There are five ways to search for an ICR step. ICR steps can be searched using the separate filter options or a combination of filter options explained below:

1. Click the search box in the top right-hand corner, type the desired ICR step as shown below:



2. For ease of use ICR steps can be filtered by clicking the dropdown box list as shown below:

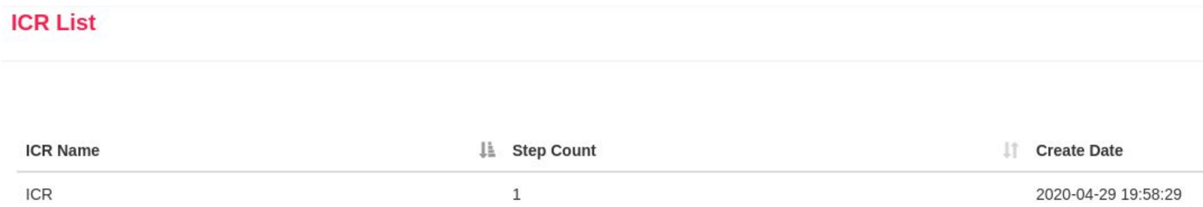


3. Filter using the appropriate dropdown selection, to find the desired ICR step.

Editing ICR

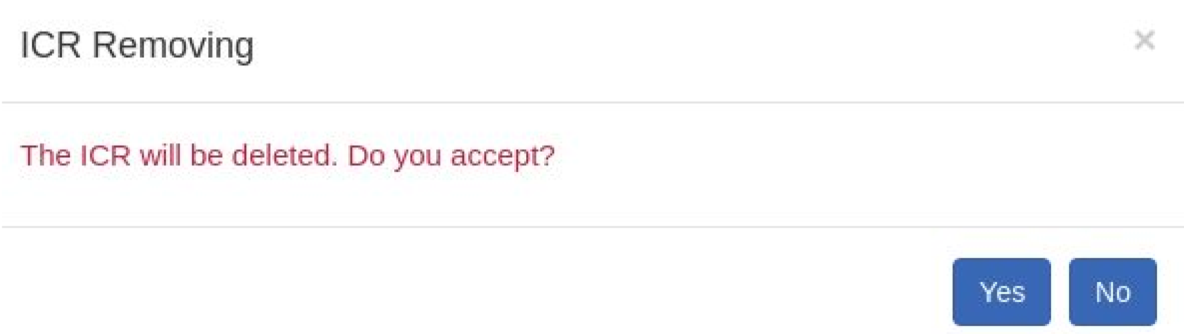
1. Click the edit button, , located to the right of the "Create Date" column, after clicking the following pop-up window will be displayed:

2. Make changes as desired
3. Click the "Save ICR" button, Save ICR, located in the top right-hand corner
4. To return to the main menu, click the "Show ICR List" button, Show ICR List, the ICR List screen will appear as shown below:



Deleting ICR

1. From the ICR name list, click the remove button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:



- *Selecting the "No" button,* No*, will cancel the deletion.*
- *Selecting the "Yes" button,* Yes*, will confirm the deletion.*

2. Confirm the deletion by clicking the "Yes" button, Yes.

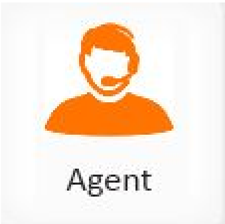
The screen will reload, and the deleted ICR will not be shown.

Searching for an ICR

1. Click the “Search” input box, type the ICR name as shown below:

Note: Partial names can be used, when spelled correctly.

Agent Screen



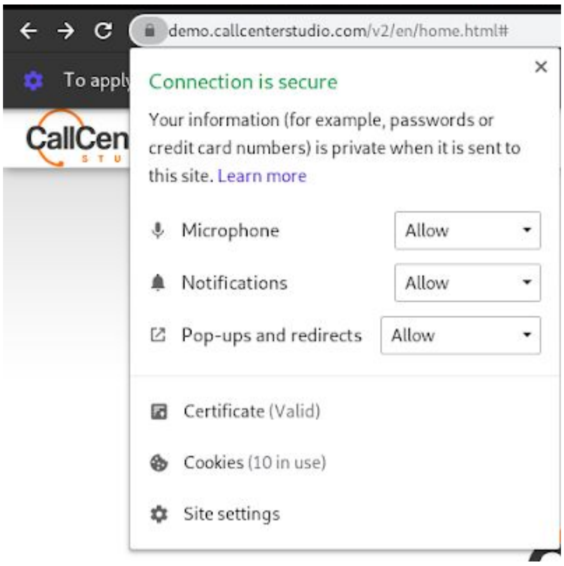
The agent screen is used by the customer service representative to perform inbound and outbound communication with customers.

Audio Settings

This section contains information to help agents in troubleshooting errors regarding the sound settings in Call Center Studio.

URL Settings

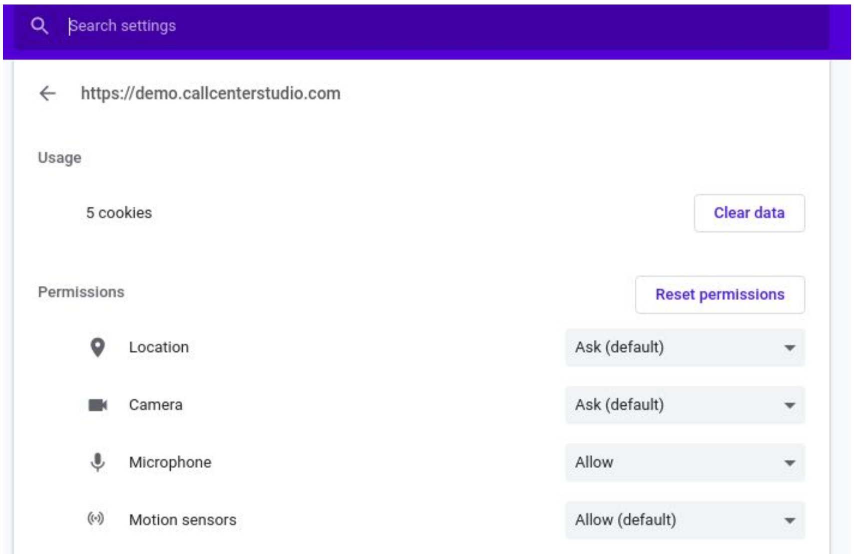
1. Click the security button to the left of the URL when clicked the following settings will be displayed:



Note: Microphone, Notifications, and Pop-ups and redirects have all been changed to "Allow" for the agent tenant screen.

2. If these settings are not initially shown, click site settings, 

, once pressed the page settings screen will appear as shown below:



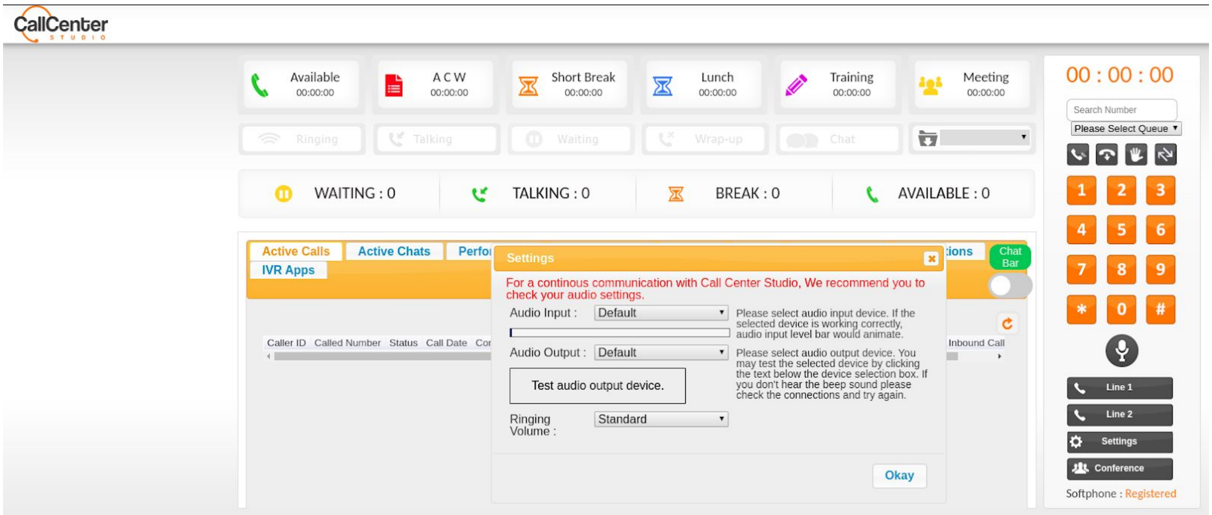
3. Look through the settings list and select "Allow" for the microphone, notification, and Pop-ups and redirects.

4. Click the exit button, 

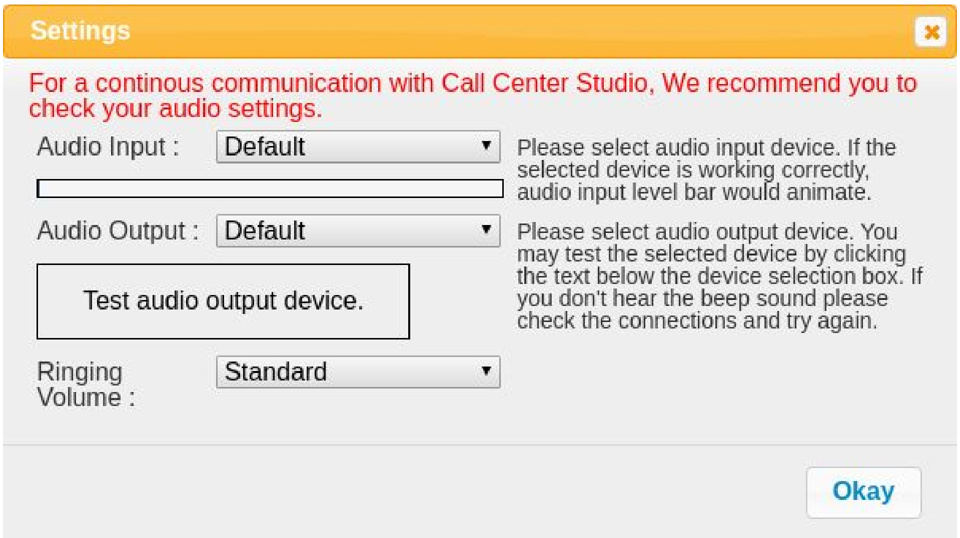
, to the right of the settings tab, and return to the Agent Screen.

Agent Screen Audio Settings

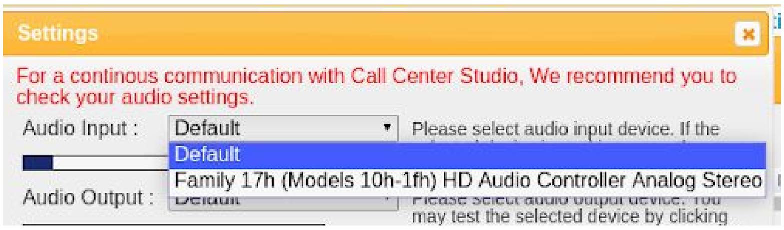
1. Once in the agent module, the following screen will appear:



2. Every time the agent logs into the Agent Screen, the tenant sound setting pop-up window will appear as shown below:

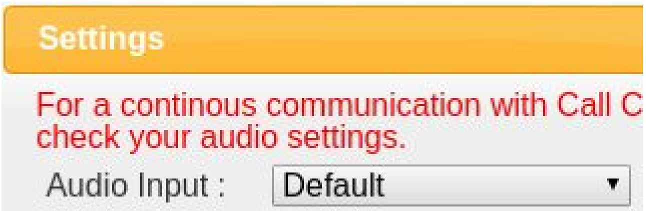


3. Click the "Audio input" dropdown box a dropdown menu will appear:

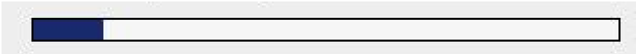


Note: In the dropdown menu, the agent should select the desired audio input method.

5. Select the desired audio input. An example is shown below:

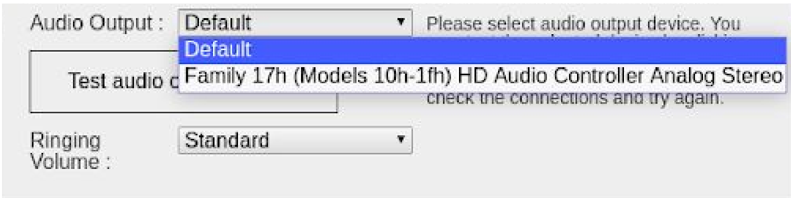


6. After selecting the desired audio input method, use the vertical soundbar shown below to determine if the audio input device is working correctly:



Note: The audio input level bar will illuminate in dark blue when speaking, to test the proper audio input connection.

7. Click the "Audio Output" dropdown box a dropdown menu will appear an example is shown below:



Note: In the dropdown menu, the agent should select the desired audio output method.

8. Select the desired audio output; an example is shown below:

9. After selecting the desired audio output method, click the "Test audio output device." button if working correctly, a beep will be heard in the agent's selected audio output device, the switch is shown below:

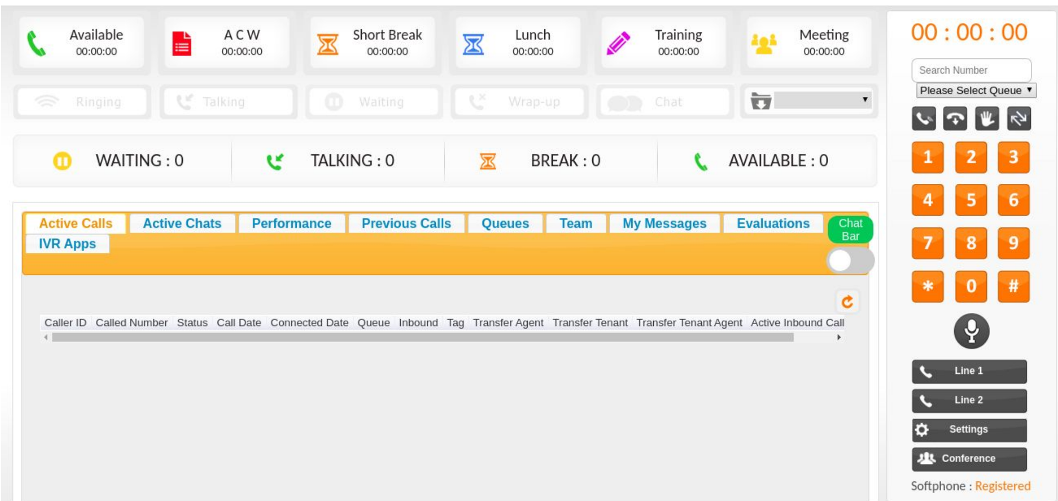
10. Click the Ringing Volume input box a dropdown menu will appear as shown below:

Note: Ringing volume is based on the agent's preference, three volumes can be selected: Low, Standard, and High.

11. Select the desired ringing volume; an example selection is shown below:

12. Once all audio settings have been selected and tested, click the "Okay" button,

. The agent screen will be displayed, as shown below:



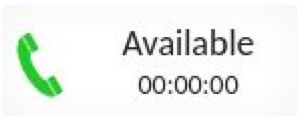
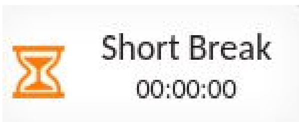
Agent Statuses

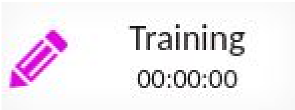
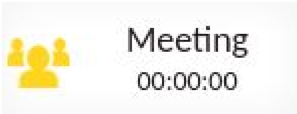
Agent statuses are used to track agent productivity. Supervisors can view the statuses of agents in real-time. The default and custom statuses are explained in detail below.

Default Statuses

At the top of the agent screen, the six Call Center Studio default agent statuses are listed, an image of these statuses is shown below:

Each status is used differently, as described below:

	Tracks agents' time in available status. For agents to make and receive calls, the available status must be selected.
	Tracks agents' time in After Call Writeups.
	Tracks agents’ time on breaks.
	Tracks agents’ time at lunch.

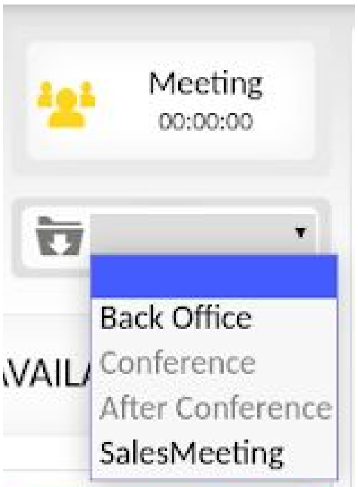
	Tracks agents' time in training.
	Tracks agent's time in meetings.

Note: Agents have to click the status that defines their current situation for proper tracking to occur. Supervisors can change the status of an agent when necessary. (See supervisor section)

Custom Statuses

Custom statuses can be created and defined by the administrator. The following information demonstrates how an agent can select a custom status.

1. Below the meeting tab is a dropdown menu with a folder containing a downward-facing arrow, click this dropdown box below:



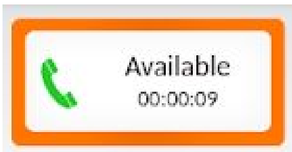
Note: Back office, Conference, and After Conference are built-in statuses and can be made active by administrators (See Statuses Section).

2. SalesMeeting status was created to provide an example of what a custom status looks like; the agent simply needs to click the status (note the agent will not be able to view the time in custom status, but the time can be viewed under the supervisor tab).

Selecting a Status

To select a Status, click the desired status from the default menu, select a custom status (See Custom Status section for more info). The chosen status will be outlined in orange; examples are shown below:

Active Default Status Example:



Active Custom Status Example:

Changing a Status

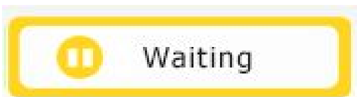
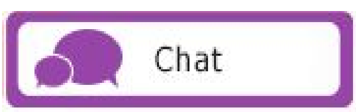
To change status, click a different status.

Call Statuses

Call Statuses are used so that the agent can know the status of the call, such as ringing, talking, waiting, wrap-up, and chat.

The call statuses are not illuminated until a call is made, the unilluminated statuses are shown below:

The five call statuses when illuminated are defined below:

	Will light-up as shown when an incoming call or outgoing call is in progress.
	Will light up as shown when an incoming or outgoing call is answered.
	Will light up when a call has been placed on hold by the agent.
	Pause, used after chatting and calling (through campaigns) for the agent to wrap-up any tasks with the customer. The agent can then reselect "Available" status to continue answering customers. (Wrap-up time can be changed in the Administrator section under Queues).
	Will light up when the agent is chatting with a customer.

Call Center at a Glance

Metrics regarding the queue and team performance are available to the agent. The "Call Center at a Glance" is a valuable resource for agents to use for time management and decision making. The "Call Center At a Glance" bar is displayed below:

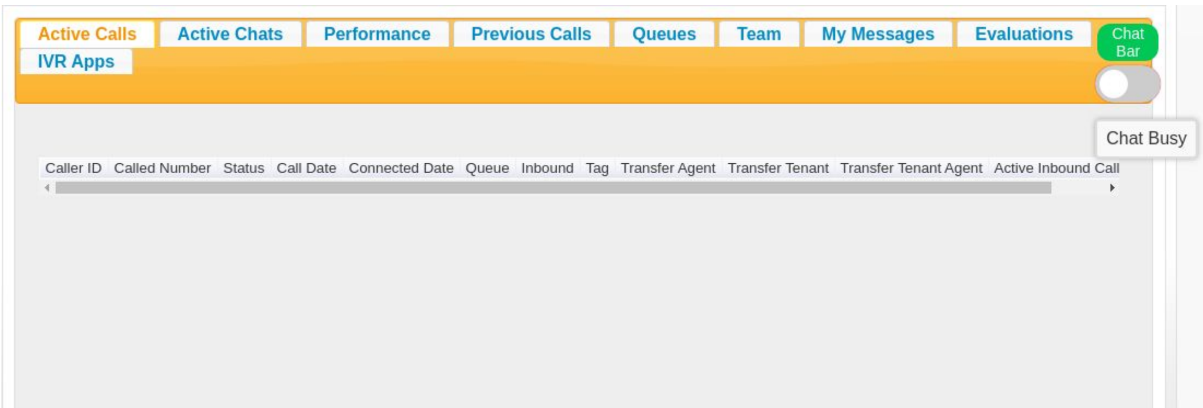
The "Contact Center At a Glance" metrics are defined below:

WAITING : 0	Displays the number of consumers waiting in the queue assigned to the agent
TALKING : 0	Displays the number of agents talking to consumers in the queue assigned to the agent
BREAK : 0	Displays the number of agents on break in the queue assigned to the agent
AVAILABLE : 0	Displays the number of agents available in the queue assigned to the agent

Agent Panel

The agent panel allows agents the ability to monitor their active calls, active chats, and performance. Also, the agent can view previous call history from this panel. Also, agents can monitor queue metrics such as total calls, answered calls, short calls, abandon calls, answer speed, and total talking time. Agents can view team status and times in status, and they can send messages to the supervisor, team, or a specific team member. Lastly, agents can see evaluations and use IVR applications all within the control panel.

An example of the agent screen is shown below:



Active Calls

The agent panel's active calls tab provides information about the agent's current call, such as the queue, the consumer name, the status of the call, the duration of the call, and the phone number. Agents can also tag a call if desired when the call is in progress from this screen.

An example of the active calls tab with an active call is shown below:

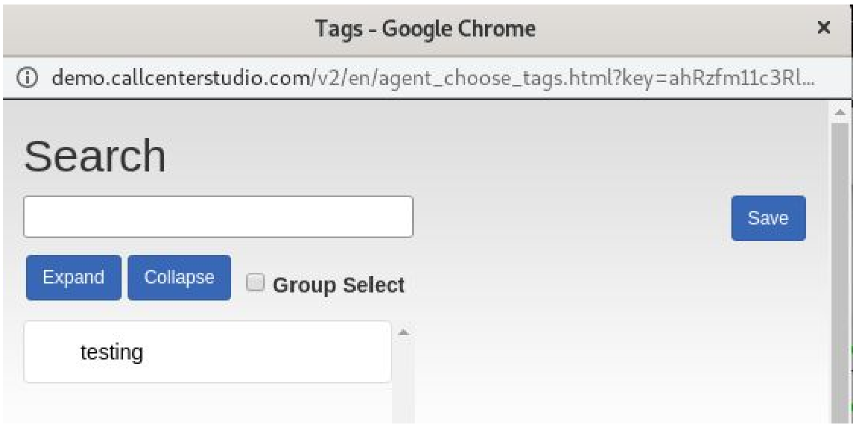
Tagging an Active Call

Calls can be tagged while the agent is talking to the consumer.

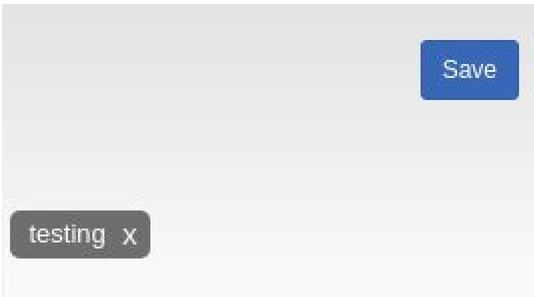
Note: If a call is tagged while the call is in progress, more tags cannot be added by the agent after the call is finished.

1. While the call is in progress a tag can be assigned to the call by clicking the tag button, 

, once click the following pop-up window will be displayed:



2. A list of created tags will be displayed. If multiple tags are used, the search input box can be used. Select the desired tag(s) from the tag list (Group tag selections can be made by checking the “Group Select” checkbox. Once a tag has been selected, it will be displayed as shown below:



Note: Tags can be deselected from the call by clicking the X to the right of the tag name.

3. Once all the desired tag selections have been made, click the save button, 

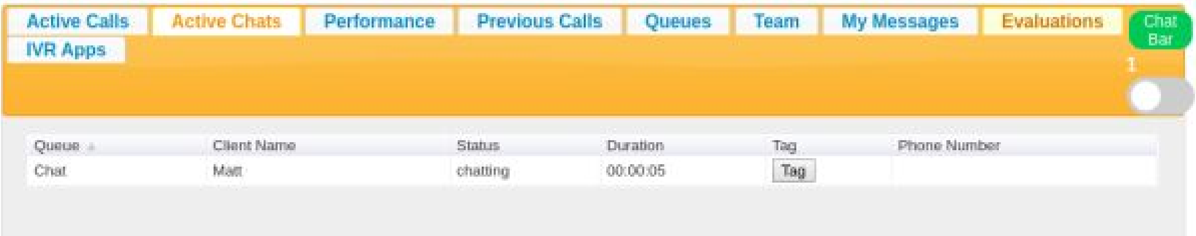
.

Note: More tags can be added while on the call if necessary by repeating steps 1 - 3.

Active Chat

Active Chat shows all of the agent's active chats. Details such as queue, client name, status, duration, tag, and phone number can be viewed in the active chat tab.

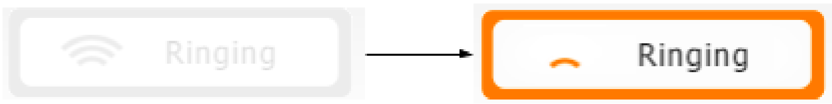
The following image is an example of the agent active chat window with a live chat:



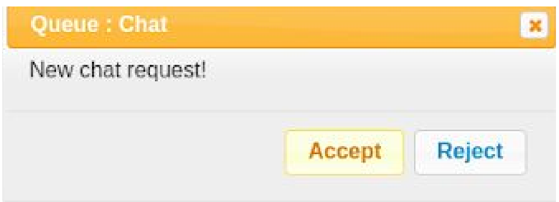
Answering a Chat

On the agent screen, the following will occur when an incoming chat appears:

The ringing call status will illuminate:



The following pop-up will appear:

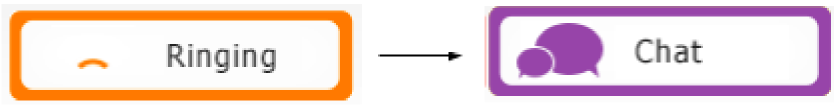


- *Select the cancel button,*  *, to reject the chat.*
- *Select the accept button,*  *, to accept the chat*

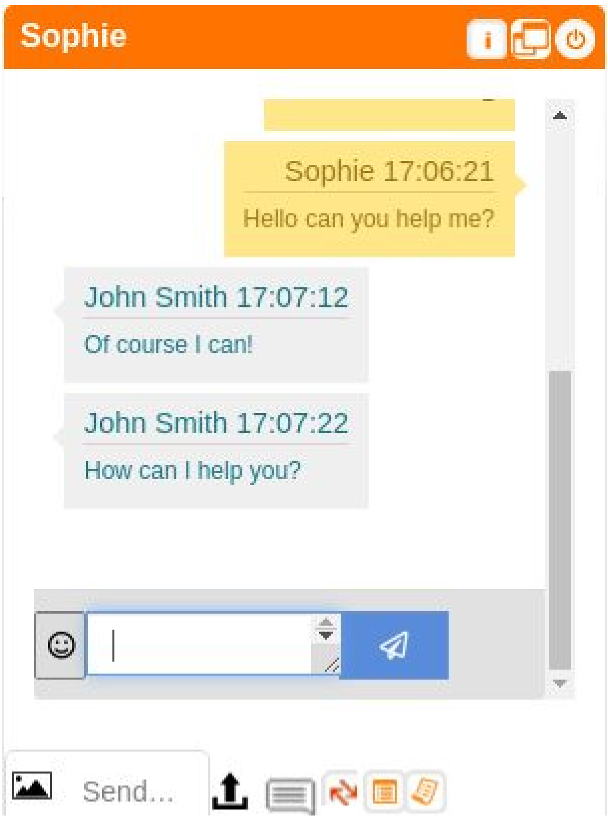
1. Click the accept button, 

, the following transitions will occur:

The ringing status will change to chat status:



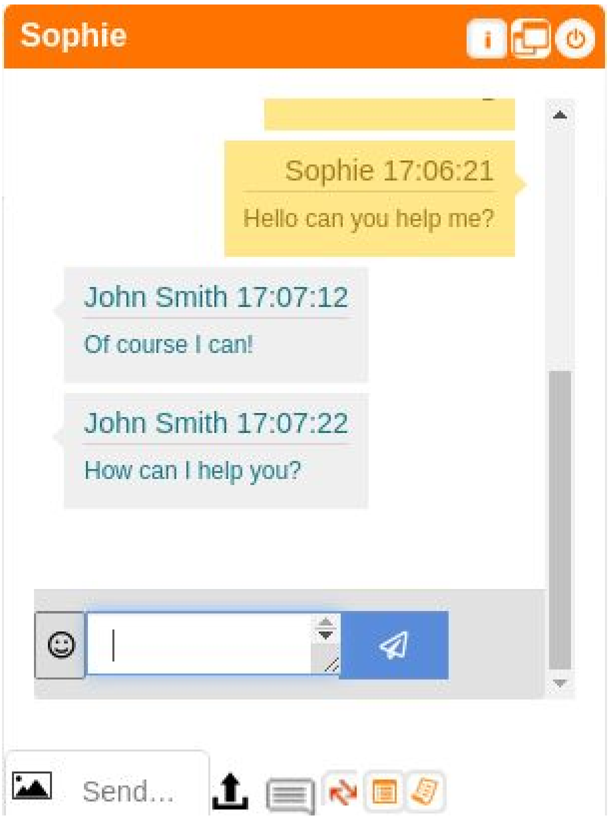
The chat window will appear:



The active chat tab will show the current chat:

Chatting

Using the chat pop-up window shown below:



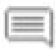
The following functions can be completed:

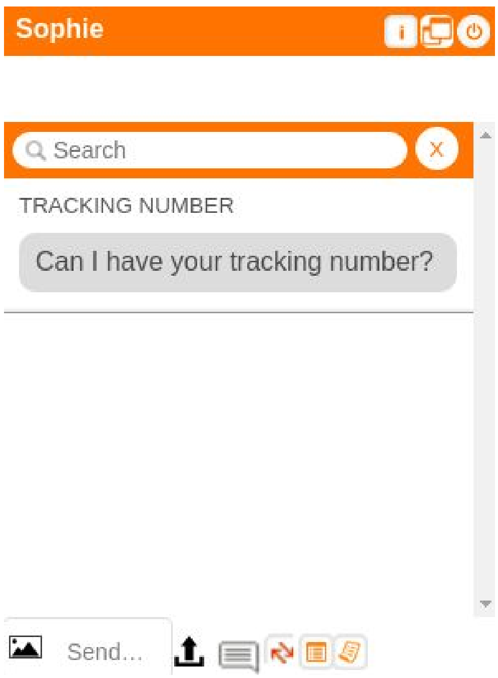
Sending a Chat Message

1. Click the message input box, , type the desired message.
2. Click the send button, 

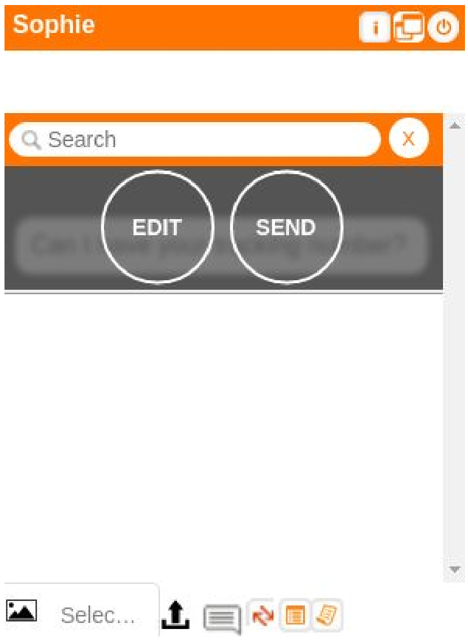
Sending a Template Message

Template messages are used by agents to increase response time and efficiency. See *Chat Widgets Section, Template messages* for information on creating a template message.

1. Click the open template messages button, , the following screen will appear in the chat window:



2. Click the desired template message. The following will appear:



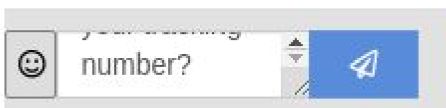
Note: If multiple template messages are present, the search input box, 

can be clicked, type the desired subject of the template message to filter the results.

3. The Template message can be sent directly by clicking the send button, 

, or the message can be edited by clicking the edit button, 

. Once the edit button is clicked the template message will appear in the message input box as shown below:

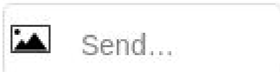


4. Edit the Template message as desired.

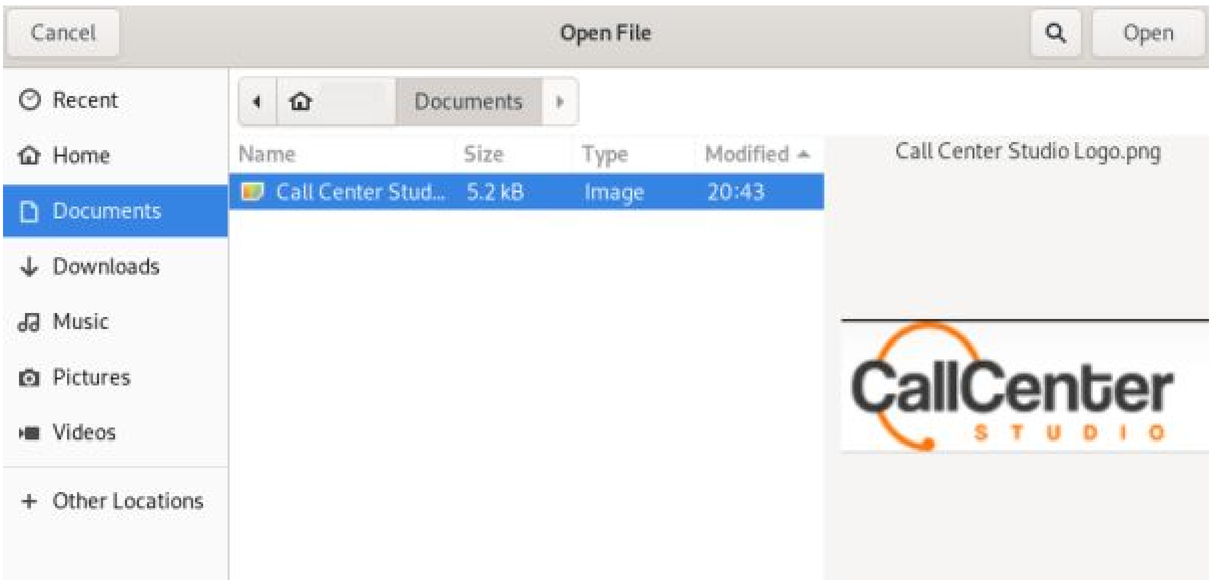
5. Click the send button, .

Sending a File

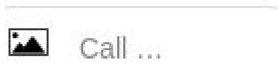
Note: Sending a file feature can not be used when "Restricted File Sharing" is checked for the chat widget. The following image shows how the agent chat screen changes when this checkbox is selected:

1. Click the send file window, 

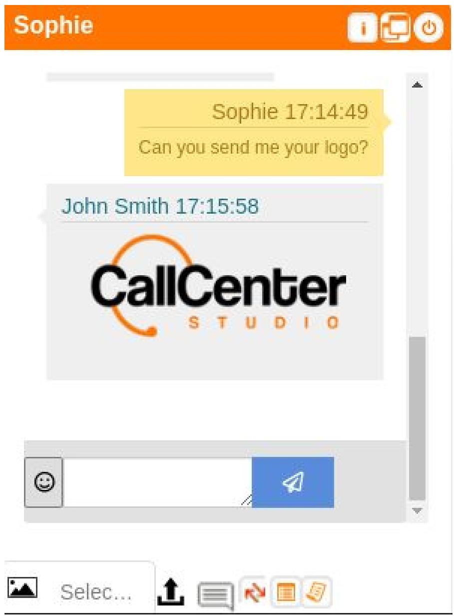
, the following popup will appear:



2. Click the desired file. The file will appear in the send file window, as shown below:



3. Click the send file button,  , the file will appear in the chat window, as shown below:

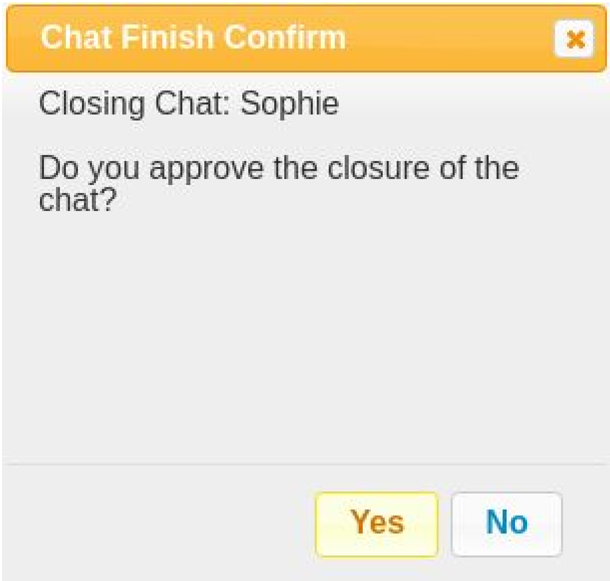


Parking a Chat

Parking allows the customer to be placed on hold. Agents can answer other chats when the customer responds the same agent will receive the chat.

1. Click the park button, 

, the following pop-up window will appear:



2. Click the yes button, 

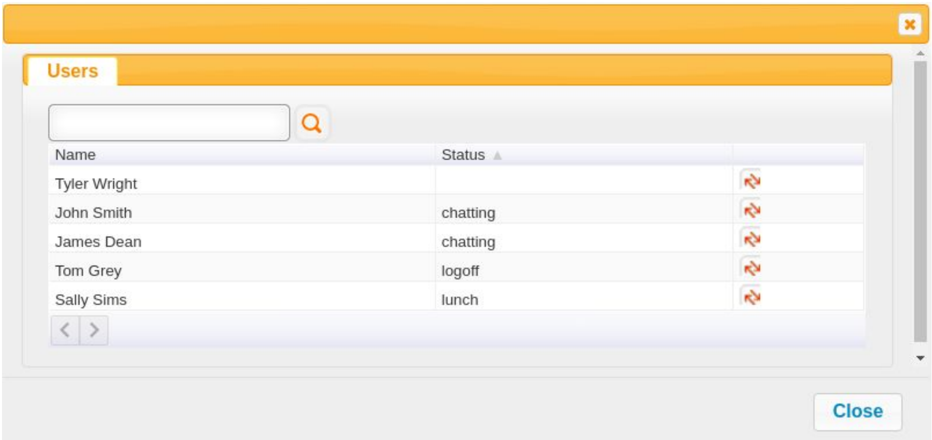
.

Expanding the Chat Window

1. Click the change size button, , the chat window will enlarge an example is shown below:

Transferring a Chat

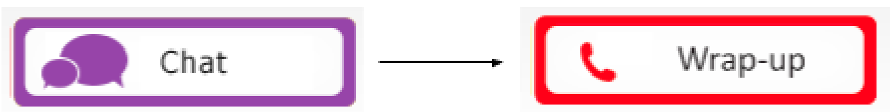
1. Click the transfer button, , the following pop-up will be displayed:



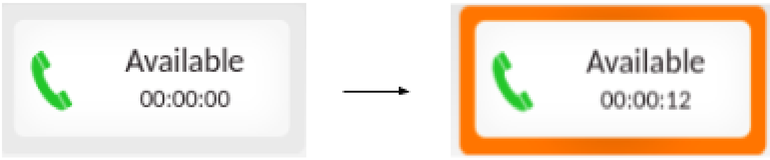
2. In the search input box, type the user's name if the agent is available, select the transfer button, , to the right of the status column. The following transition will take place:

The chat window will disappear.

The chat status will change to wrap-up status:

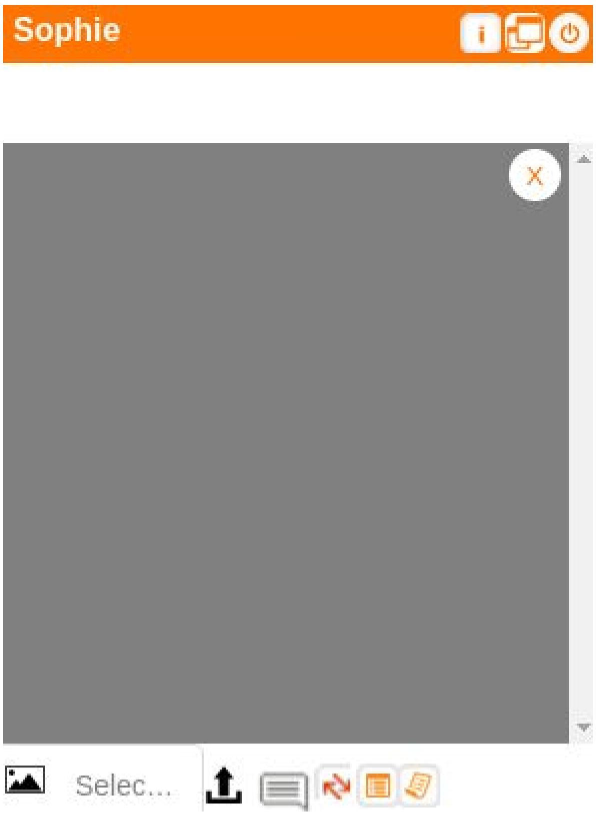


The available button will illuminate:



Pulling Data from a CRM Using a Web Service for a Chat

1. Click the custom field button, , the following pop-up screen will appear:



Note: Currently, the custom field example is not pulling information from the web service because the screen is blank. When using a web service, data about the customer from the

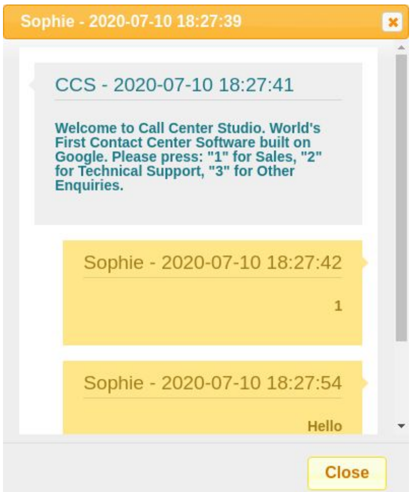
CRM can be viewed here. (If desired, this feature can be completed, talk to the assigned Call Center Studio Project manager.)

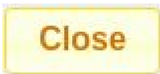
<u>*Viewing Customer Previous Chat History on a Chat*</u>

1. Click the view history button, , the following pop-up screen will appear:

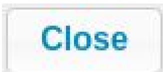
Note: Previous customer chat history can be viewed if the customer inputs the same email address. The tenant uses the email to keep track of the chat records.

2. Click the desired underlined date located in the date column. The following pop-up screen will be displayed:



3. After viewing, click the "Close" button, 

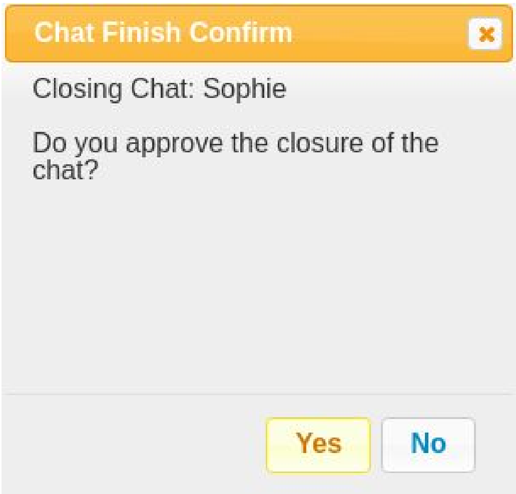
.

4. Then click the other "Close" button, 

, to exit the previous chat history window.

Finishing a Chat

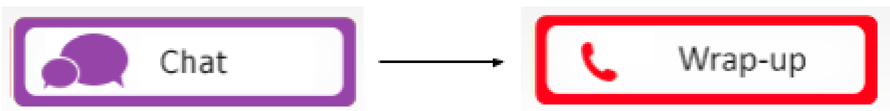
1. Click the finish chat button, , the following pop-up screen will appear:



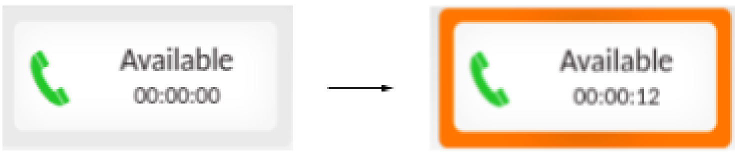
2. Click the yes button, . The following transitions will occur:

The chat window will disappear.

The chat status will change to wrap-up status:



The available button will illuminate:



Performance

The performance tab monitors an agent’s daily self-performance.

Performance metrics such as total calls (call metrics), total holds (hold metrics), and chat metrics can be viewed in this tab. An example performance tab is shown below:

Previous Calls

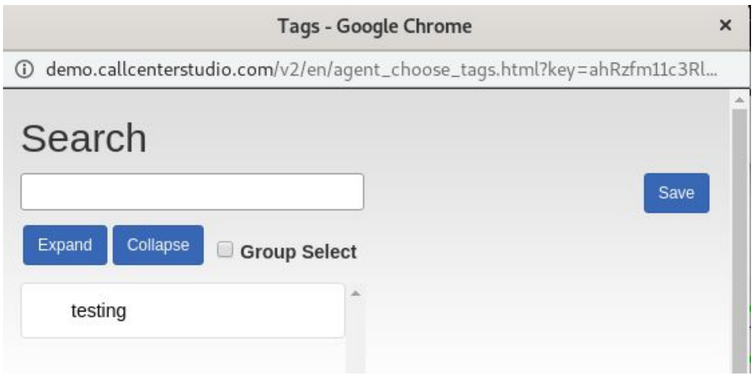
The previous call tab lists the last 19 calls that the agent has made or received. Quick metrics on these calls can also be viewed under the performance tab and the ability to tag previous calls. An image of a “Previous Call” tab is displayed below:

Tagging a Previous Call

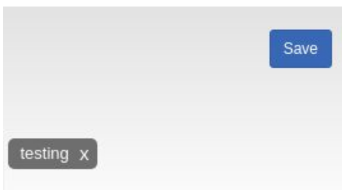
Note: If a call is tagged in the previous call screen,, more tags cannot be added after the save button is clicked.

1. Click the tag button, 

, located on the far right of the call metrics, once clicked, the following pop-up window will be displayed:



2. A list of created tags will be displayed. If multiple tags are used, the search input box can be used. Select the desired tag or tags from the tag list (Group tag selections can be made by checking the "Group Select" checkbox. Once a tag has been selected, it will be displayed as shown below:



Note: Tags can be deselected from the call by clicking the X to the right of the tag name.

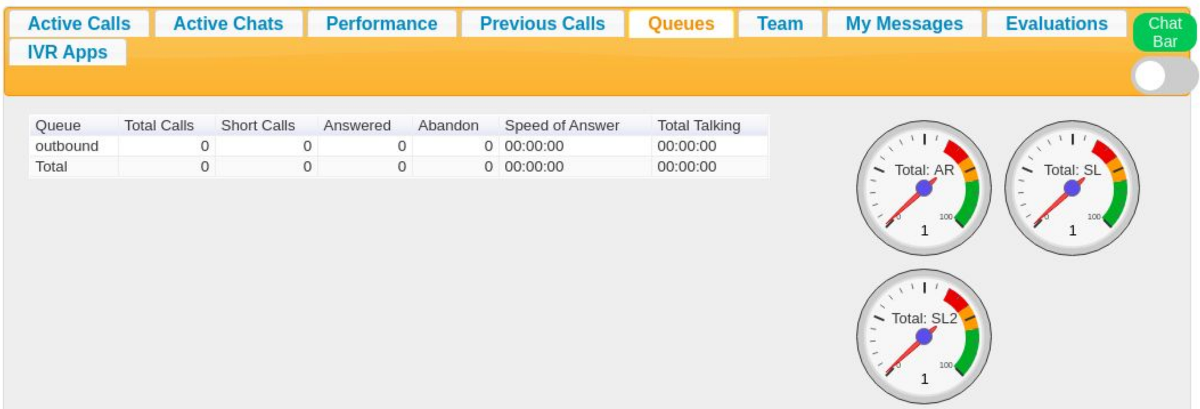
3. Once all the desired tag selections have been made, click the save button, 

.

Queue

The Queue tab gives the agent brief performance metrics on how the assigned queue is performing. Metrics such as total calls, short calls, answered calls, abandoned calls, answering speed, and total talking time can be found under the Queue tab.

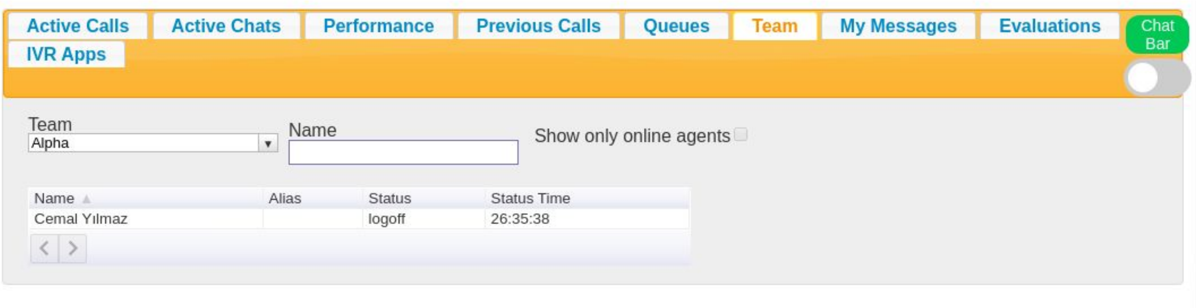
An example "Queue" tab is shown below:



Team

The administrator or supervisor can make and assign agents to teams. If the agent has been assigned a team, quick metrics on team members such as name, status, and status time can be viewed here.

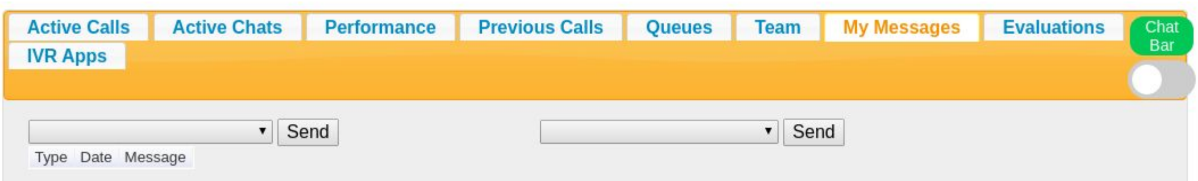
An example of the team tab is shown below:



My Messages

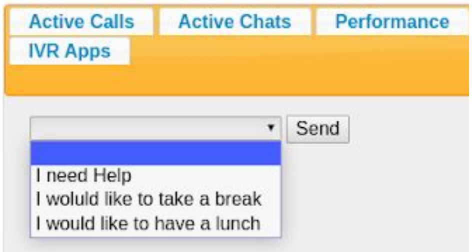
The My Messages tab is used by the agent to send messages to a supervisor and team members.

An example of the My Messages tab is shown below:

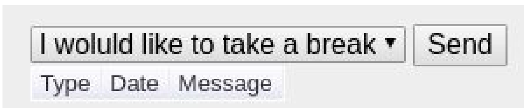


Sending a Default Message to a Supervisor

1. Click the first dropdown box (on the left) an example dropdown listing of default messages is shown below:

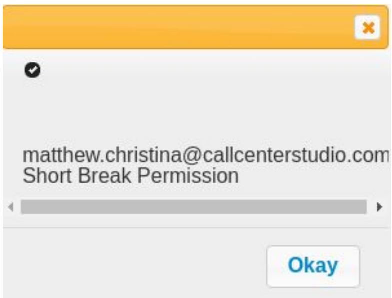


2. Click the desired message an example selection is shown below:



3. Click the send button, 

. The following notification pop-up window will be displayed on the supervisor screen:

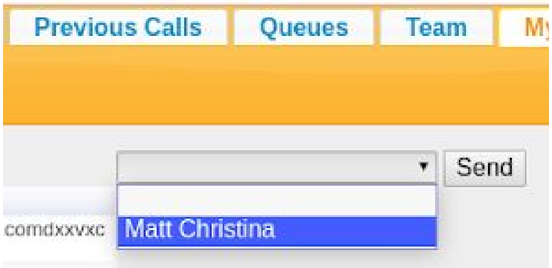


Note: Previously sent messages can be viewed by the agent, as shown below:

Type	Date	Message
Customer Representative	28/5/2020 17:23:41	sheldon.warren@callcenterstudio.comhello
	28/5/2020 17:23:41	hello

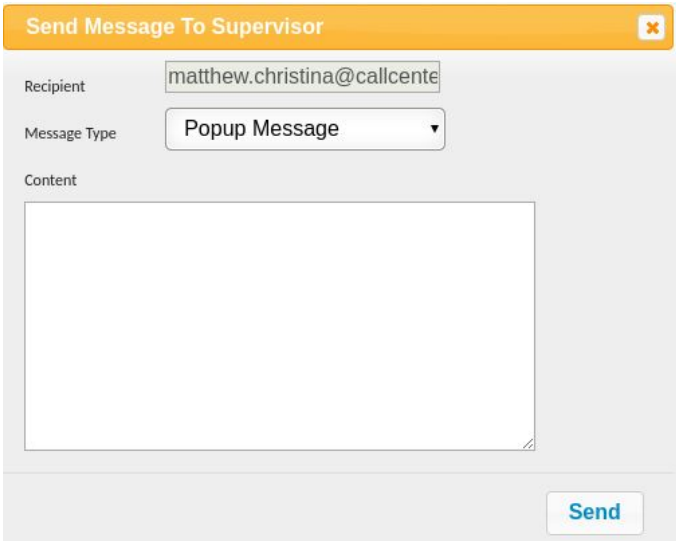
<u>*Sending a Custom Message to a Supervisor*</u>

1. Click the second dropdown box (on the right) the following dropdown menu will appear:



Note: If the agent is assigned a team, and there are multiple supervisors, all the supervisors' names will be listed in the dropdown menu.

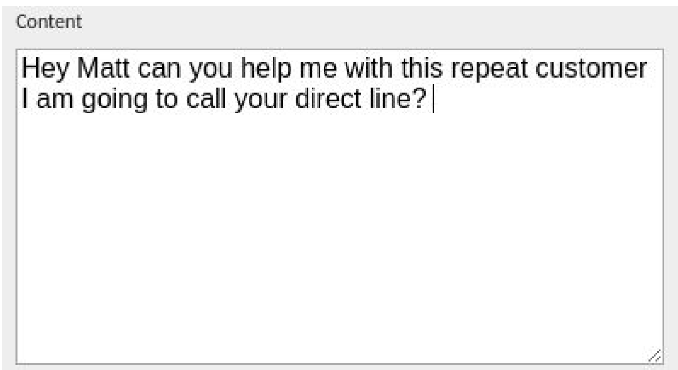
2. Click the desired supervisor (if multiple) the following pop-up window will appear:



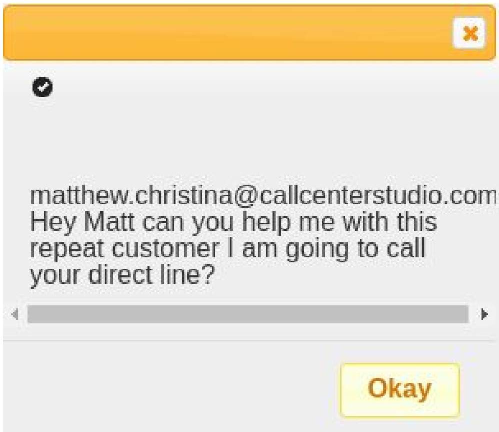
3. Click the message type input box the following dropdown menu will be shown:

4. Select the desired message type. Note the default message type is Popup Message. An example selection is shown below:

5. Click the content input box, and compose the message. An example message is displayed below:



6. Click the send button, Send. The following notification pop-up window will be displayed on the supervisor screen:



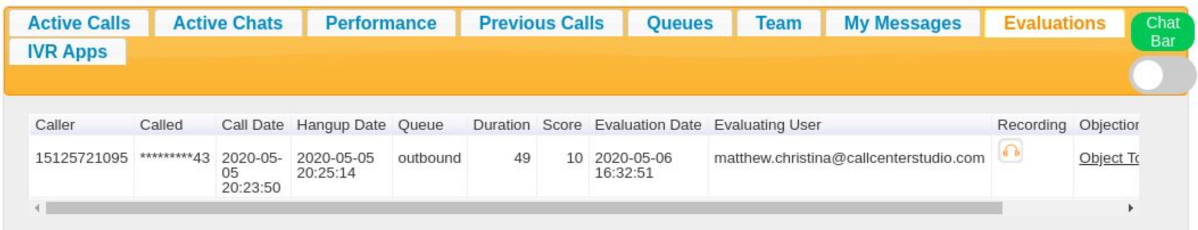
Note: Previously sent messages can be viewed by the agent as shown below:

Type	Date	Message
	5/5/2020 20:41:48	Hey Matt can you help me with this repeat customer I am going to call your direct line?

Evaluations

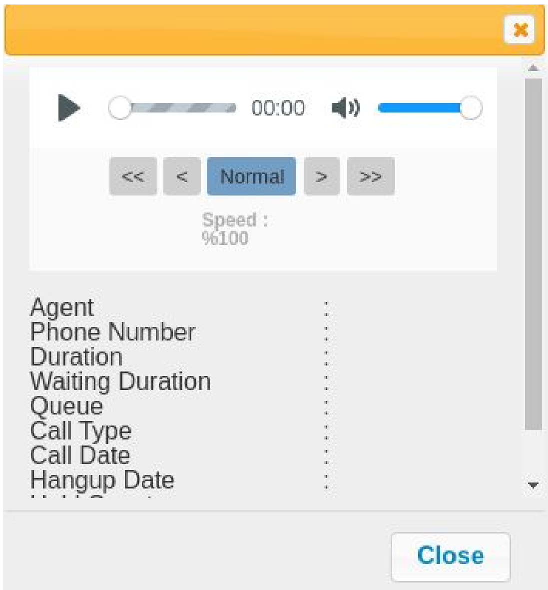
Supervisors can evaluate agent performance based on calls and chats. Agents can view evaluations under the evaluations tab. Details can be seen under this tab, such as Caller, date, duration of the call, evaluation score, and call recording. Agents can also view supervisor comments, messages, or make objections on the evaluated score.

An example of the evaluation tab with an agent evaluation is shown below:



Listening to Call Recording from an Evaluation

1. Click the “Recording” button, , under the recording column on the evaluation. The following pop-up will be displayed:



2. Click the play button, , to listen to the recording.

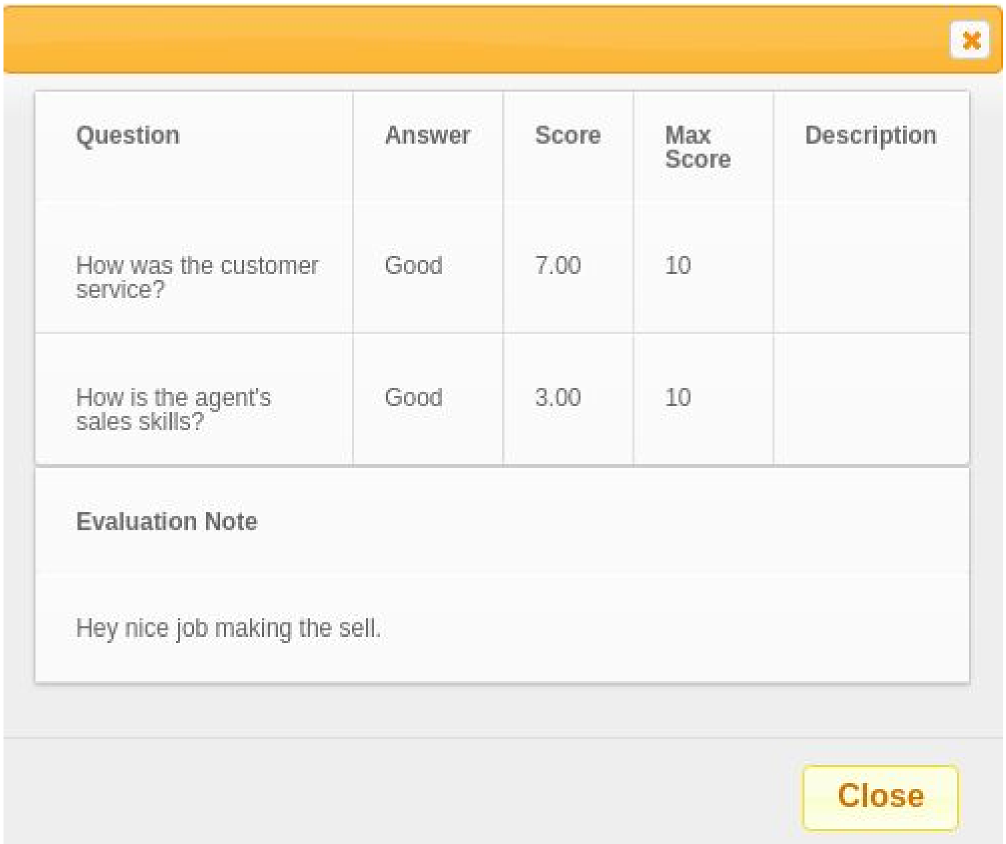
Note: recording speed can be adjusted (Between 50% and 150%) using the bar shown below:

Note: volume can be adjusted using the bar shown below:

3. Click the close button, Close .

Viewing Supervisor Comments from an Evaluation

1. Click the "Detail" button, Detail , under the evaluation detail column on the evaluation. The following pop-up will appear:

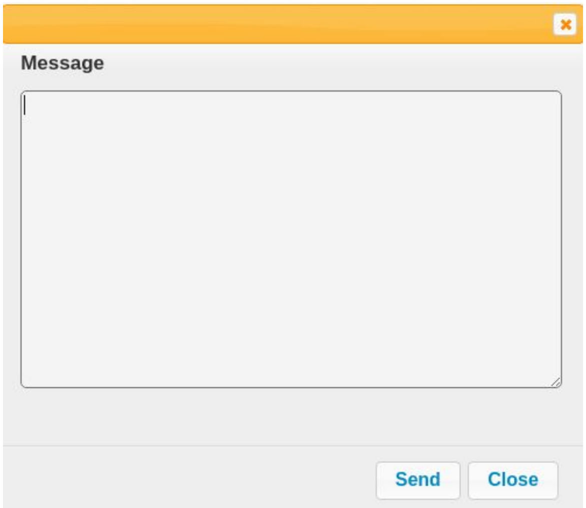


Note: Evaluations questions, answers, agent scores, max scores, and evaluation notes can all be viewed from the evaluation detail pop-up window.

3. To exit the evaluation window, click the close button, Close .

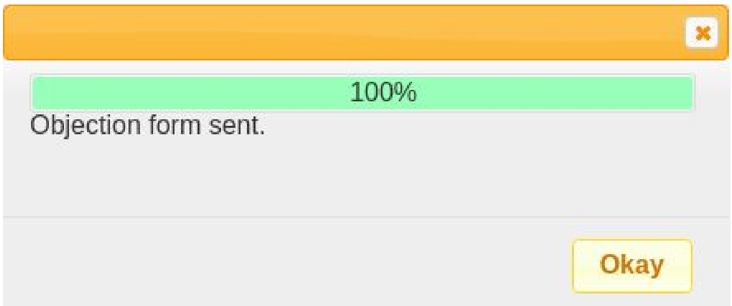
Commenting on an Evaluation

1. Click the “Object To” button, Object To , under the objection column on the evaluation. The following pop-up will appear:



2. Click the message input box, type a message to be sent to the supervisor.

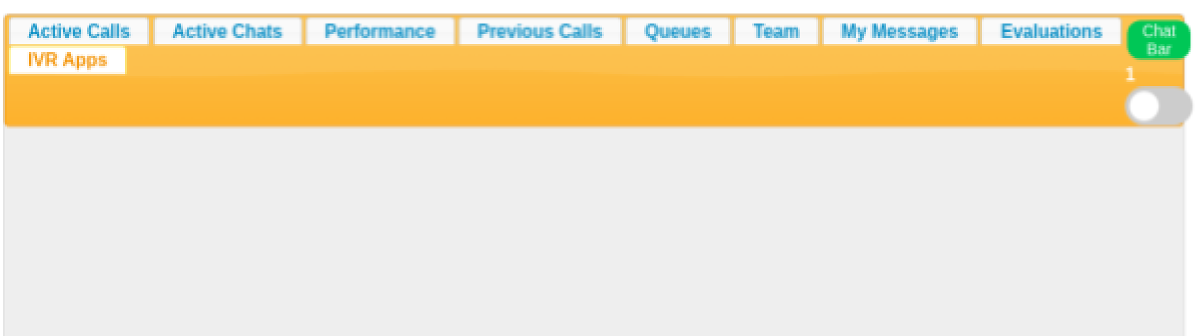
3. Click the send button, Send, the following confirmation window will be displayed:



4. Click the okay button, Okay, to return to the agent screen.

IVR Apps

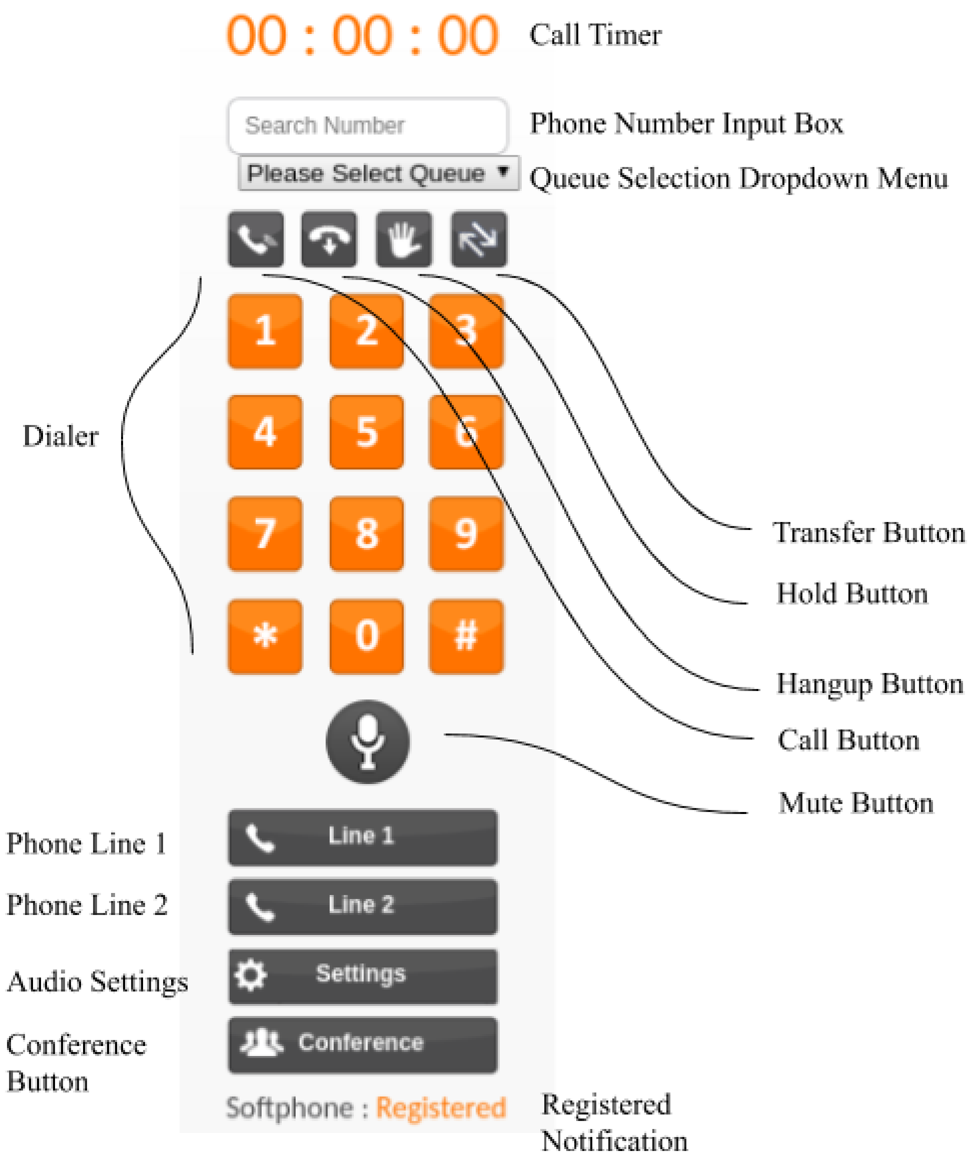
The IVR apps section is displayed here. It is blank because there are numerous IVR apps that the Call Center Studio development team can add according to your operation. (For more information on IVR apps or to have one added, contact the assigned Call Center Studio Program Manager).



Softphone

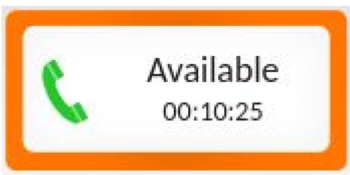
The softphone is used by the agent for manual dialing, transferring, talking to multiple customers, conference calls, settings adjustments, holds, and hangups.

An example of the softphone with descriptions is shown below:

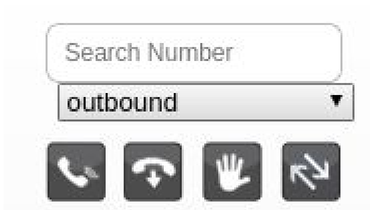


Receiving a Call

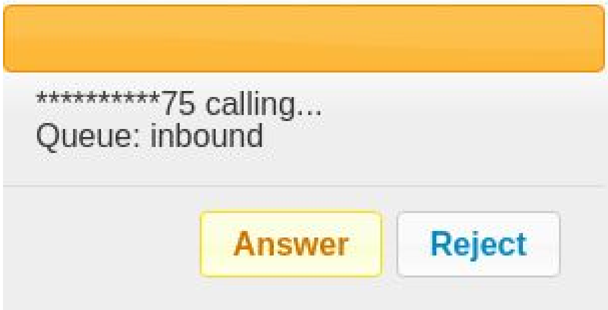
1. Check registered notification, Softphone : Registered, located at the bottom of the softphone (see softphone image). If "Registered" is not visible, check the network connection.
2. Click Available Status, once clicked, the status will be highlighted in orange, as shown below:



3. Click the queue selection dropdown menu, Please Select Queue, select the desired queue, an example queue selection is shown below:



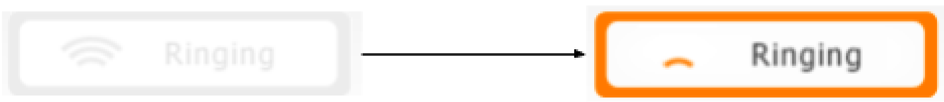
4. When an inbound call comes in the following pop-up window will be displayed:



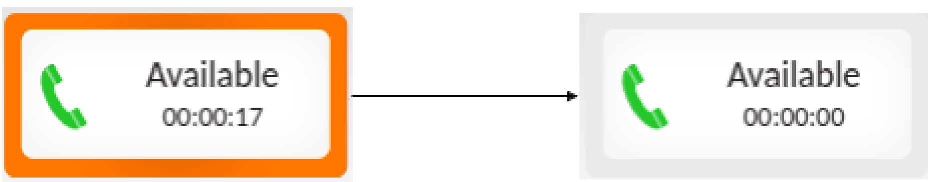
The following transitions also occur:

Line 1 shown in gray will change to green, as shown below:

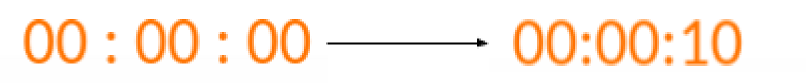
Ringing will illuminate in orange, as shown below:



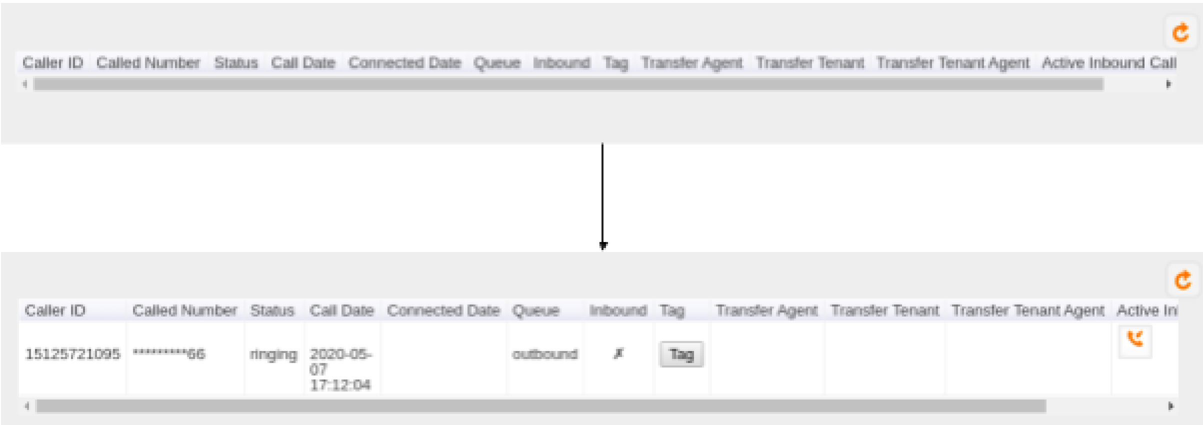
The "Available" button will transition, as shown below:



The Call Timer will start timing the ringing time, as shown below:

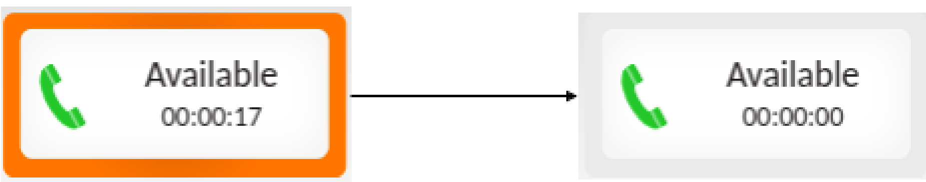


The Agent panel will display the call, as shown below:

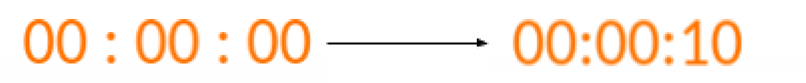


5. Click the Answer button, . The following transitions will occur:

The available button will transition, as shown below:

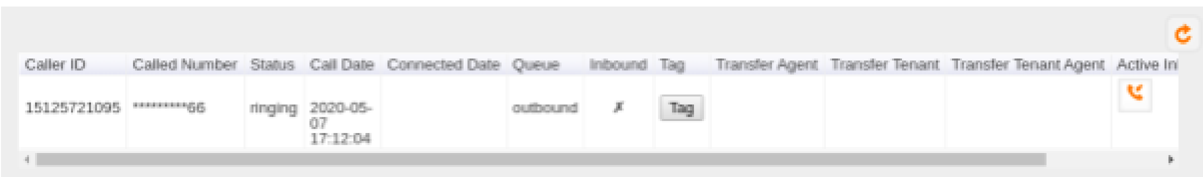


The Call Timer will start timing the call as shown below:



The illuminated ringing status will transition to illuminated calling status, as shown below:

The displayed call status in the Agent panel will change from ringing to talking, as shown below:

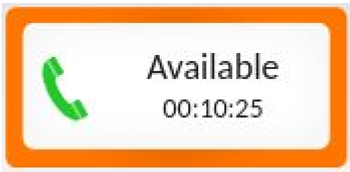


Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active In
15125721095	**********66	ringing	2020-05-07 17:12:04		outbound	✗	Tag				

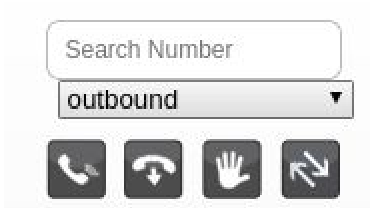
Caller ID	Called Number	Status	Call Date	Connected Date	Queue	Inbound	Tag	Transfer Agent	Transfer Tenant	Transfer Tenant Agent	Active In
15125721095	**********66	talking	2020-05-07 17:13:19	2020-05-07 17:13:29	outbound	✗	Tag				

Making a Call

1. Check registered notification, Softphone : Registered , located at the bottom of the softphone (see softphone image). If "Registered" is not visible, check the network connection.
2. Click Available Status, once click it will be highlighted in orange, as shown below:



3. Click the queue selection dropdown menu, Please Select Queue ▾, select the desired queue, an example queue selection is shown below:

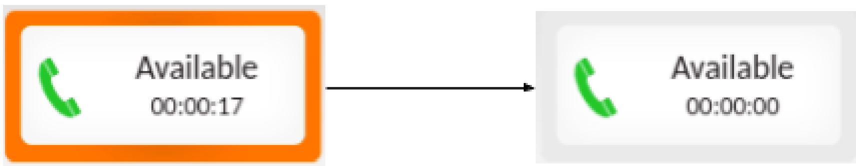


4. Click the phone number input box, 

, type the desired phone number using the Dialer (as displayed in the softphone image) or use the computer's keyboard, an example is shown below:

5. Click the Call Button, , or the Enter key (found on keyboard), once the call is dialed the following will take place as shown below:

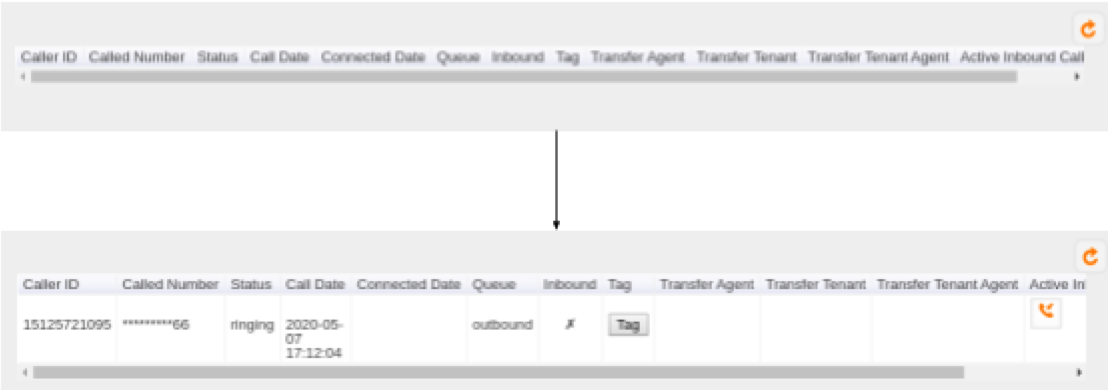
The available button will transition, as shown below:



Line 1 shown in gray will change to green, as shown below:

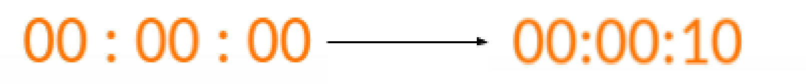
Ringing will illuminate in orange, as shown below:

The Agent panel will display the call, as shown below:



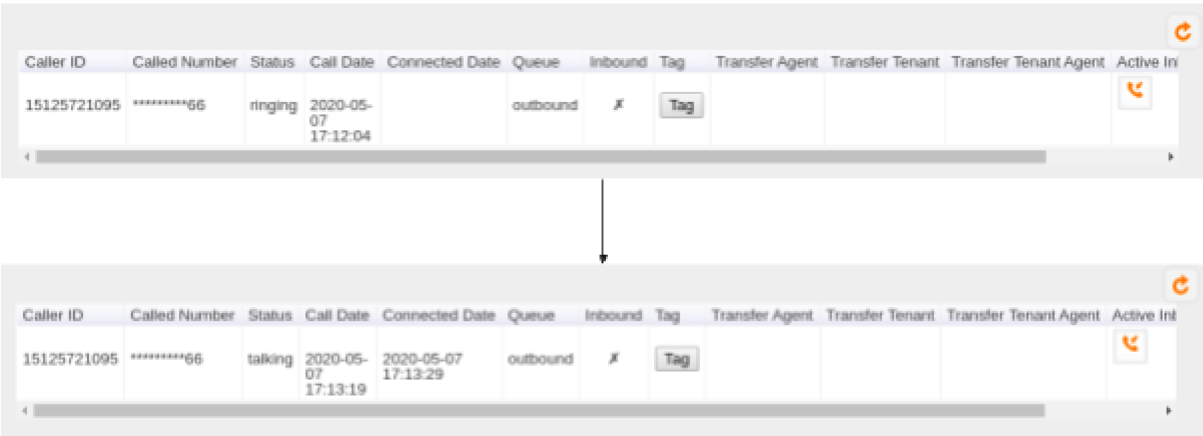
6. Once the call is answered, the following will take place, as shown below:

The Call Timer will start timing the call as shown below:



The illuminated ringing status will transition to illuminated calling status, as shown below:

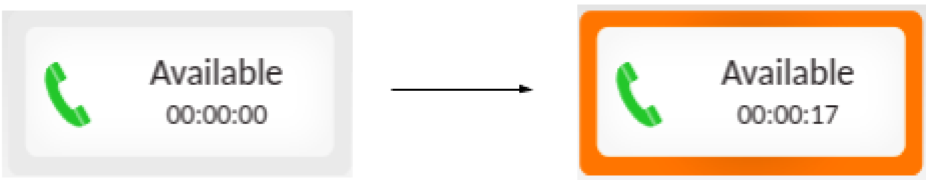
The displayed call status in the Agent panel will change from ringing to talking, as shown below:



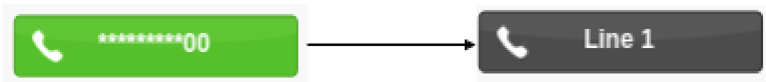
Ending a Call

1. Click the Hangup Button,  , the following transitions will take place as explained below:

The available button will illuminate again in orange (timer will begin again for available status):



The illuminated in green line 1 will transition to gray:



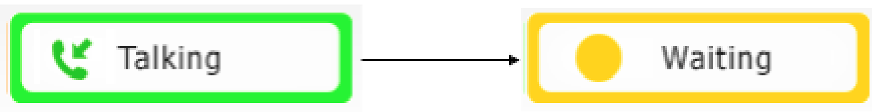
The Call Timer will stop the call, as shown below:

Note: The call timer will display the most recent call time.

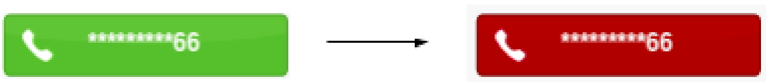
Putting a Call on Hold

1. While a call is in progress, click the Hold Button, , the following transitions will take place as explained below:

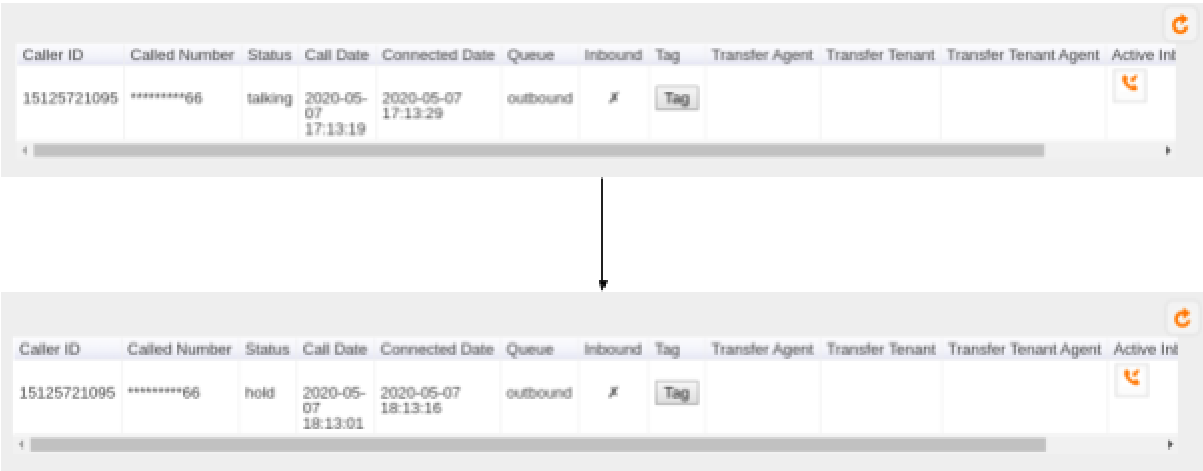
The talking status will transition to the waiting status, as shown below:



Line 1 will change from green to red, as shown below:

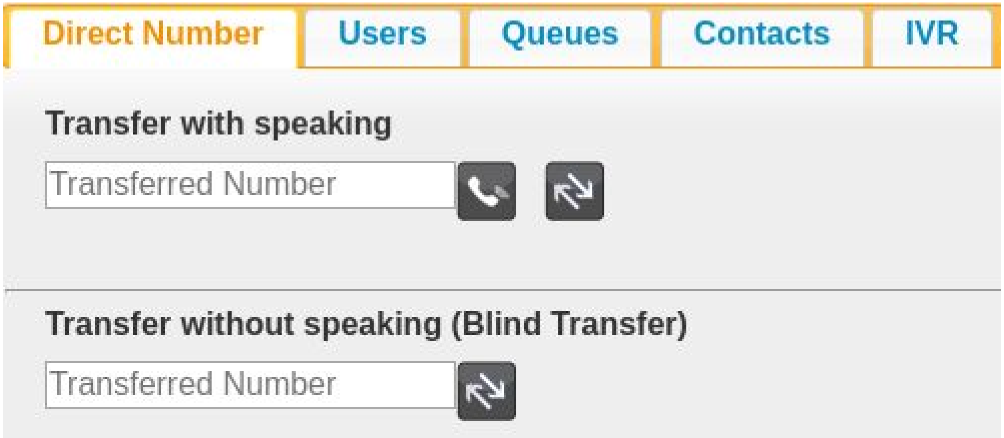


The displayed call status in the Agent panel will change from talking to holding, as shown below:



Performing a Call Transfer

1. While on a call click the transfer button, , the following input box will appear:



There are four ways to transfer:

Direct Number

To transfer via direct number:

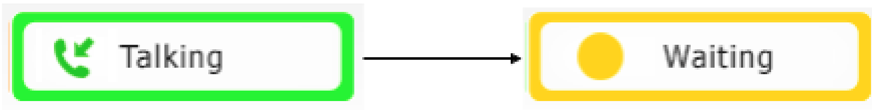
Transfer with speaking

1. Click the Transfer with speaking input button, 

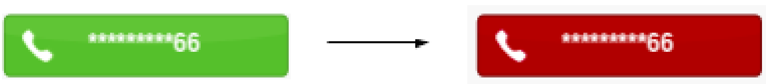
, type the desired number for the transfer.

2. Click the call button, , the following will take place,

The talking status will transition to the waiting status, as shown below:



Line 1 will be placed on hold:

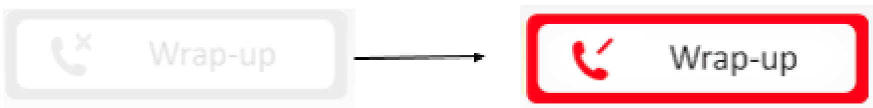


Line 2 will illuminate in green:

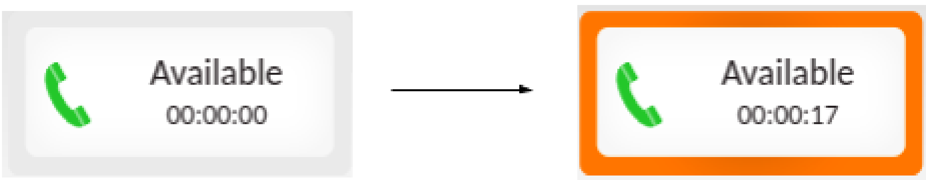
3. Once Line 2 answers the phone, the agent can explain the situation to the caller on line 2.

4. After explaining the situation, click the transfer button,  , the transition will take place:

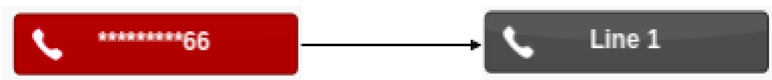
Wrap-up call status will illuminate:



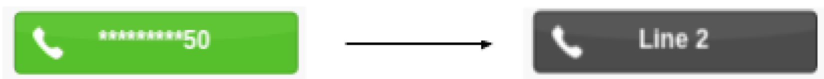
The available button will illuminate again in orange (timer will begin again for available status):



The illuminated in red, line 1 will transition to gray:



The illuminated in green, line 2 will transition to gray:



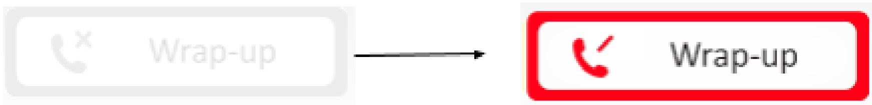
Transfer without speaking

1. Click the Transfer without speaking the input button, 

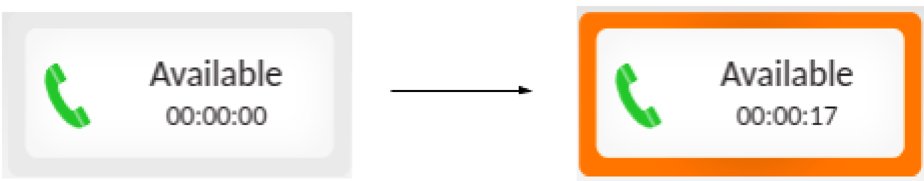
, type the desired number for the transfer.

2. Click the transfer button, , the following will take place.

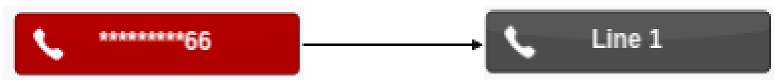
Wrap-up call status will illuminate:



The available button will illuminate again in orange (timer will begin again for available status):

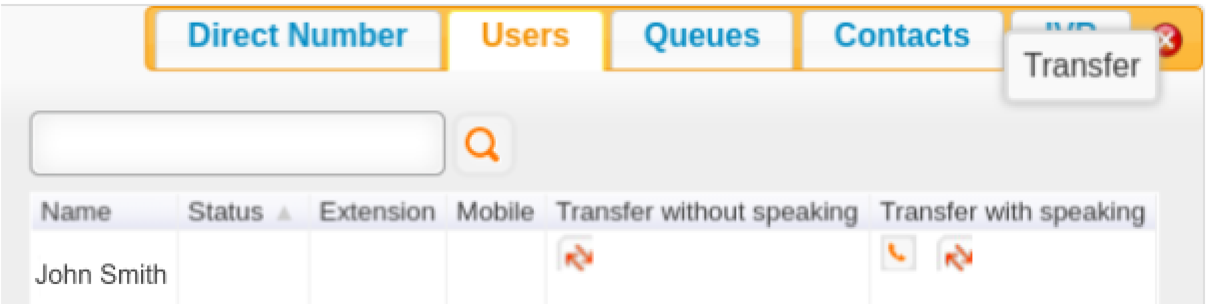


The illuminated in redline 1 will transition to gray:



Users

1. To transfer a call to a Call Center Studio user, click the "Users" tab  . The following screen will be shown below:

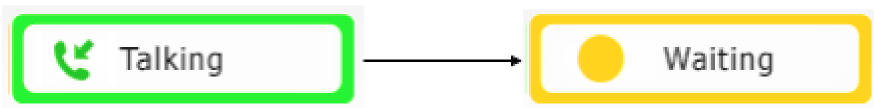


Transfer with speaking

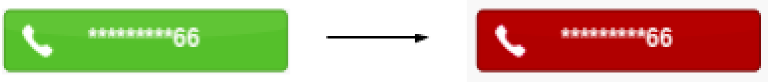
1. Click the search input, type the desired user's name, as shown below:

2. Click the call button,  located under the Transfer with speaking column, for the desired user. The following will take place:

The talking status will transition to the waiting status, as shown below:



Line 1 will be placed on hold:

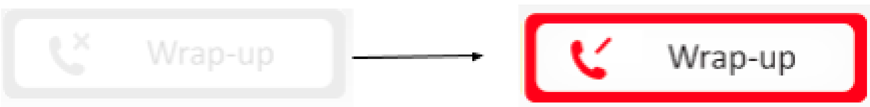


Line 2 will illuminate in green:

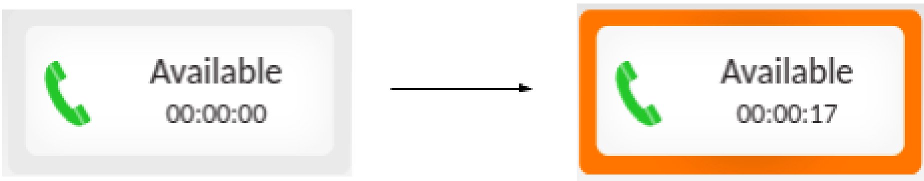
3. Once Line 2 answers the phone, the agent can explain the situation to the user on line 2.

4. After explaining the situation, click the transfer button,  located to the right of the call button  , the transition will take place:

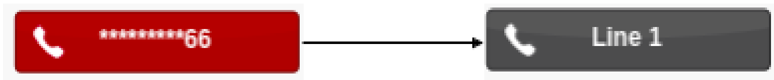
Wrap-up call status will illuminate:



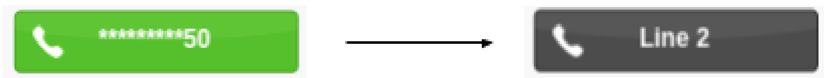
The available button will illuminate again in orange (timer will begin again for available status):



The illuminated in redline 1 will transition to gray:



The illuminated in green line 2 will transition to gray:

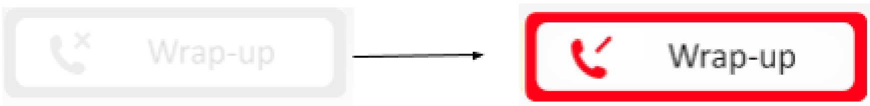


Transfer without speaking

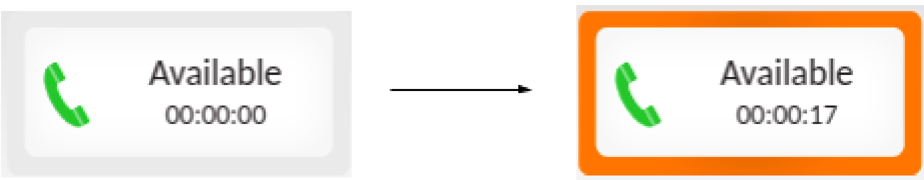
1. Click the search input, type the desired user's name, as shown below:

2. Click the transfer button,  located under the Transfer without speaking column, for the desired user. The following will take place:

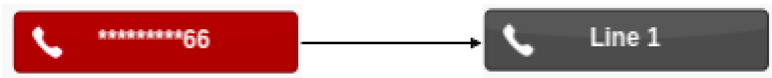
Wrap-up call status will illuminate:



The available button will illuminate again in orange (timer will begin again for available status):



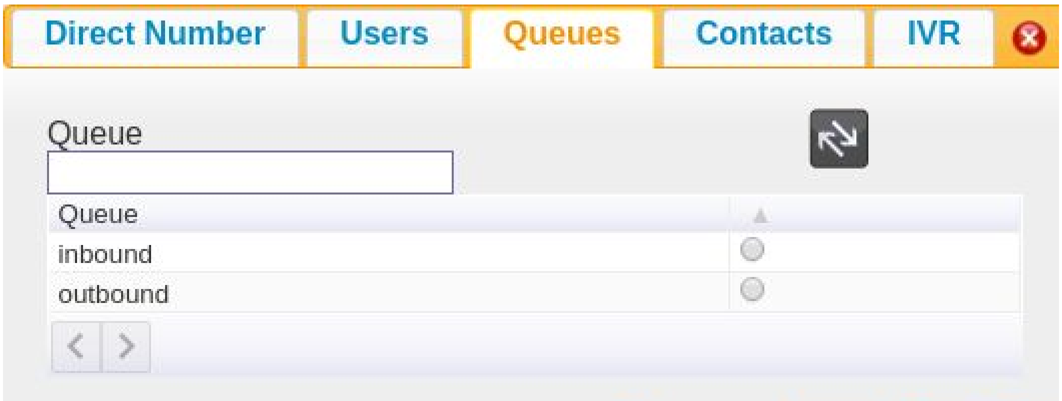
The illuminated in redline 1 will transition to gray:



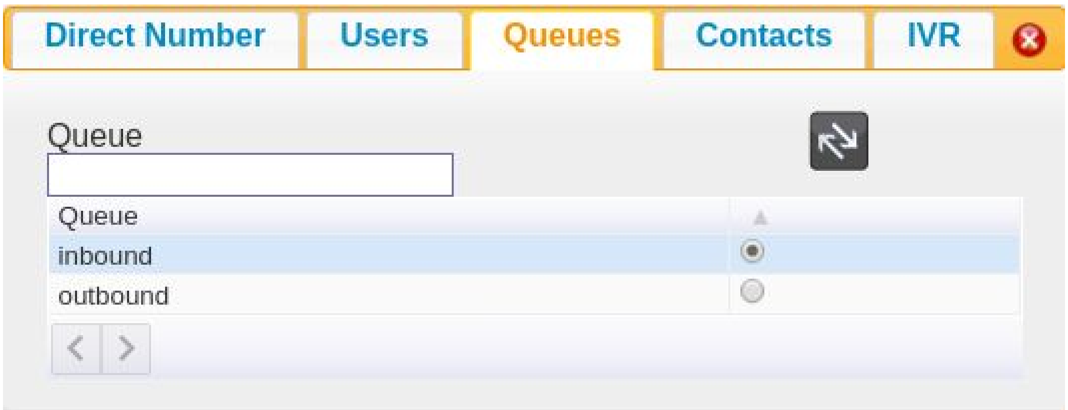
Queues

1. To transfer a call to another queue, click the queues tab 

. The following screen will be shown below:

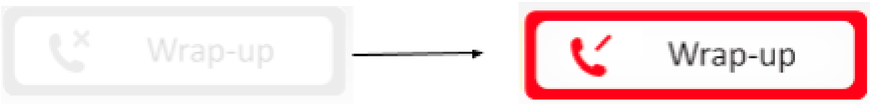


2. Use the search box or directly search for a queue. Click the radio button for the desired queue; an example is shown below:

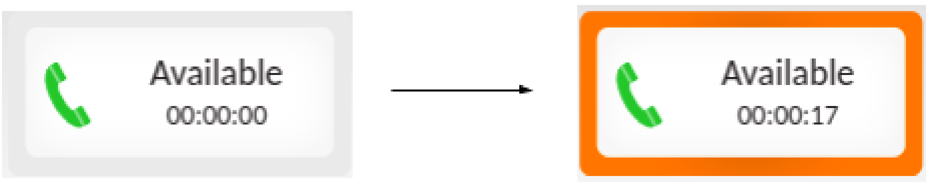


3. Click the transfer button, , the following will take place.

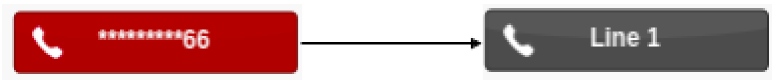
Wrap-up call status will illuminate:



The available button will illuminate again in orange (timer will begin again for available status):

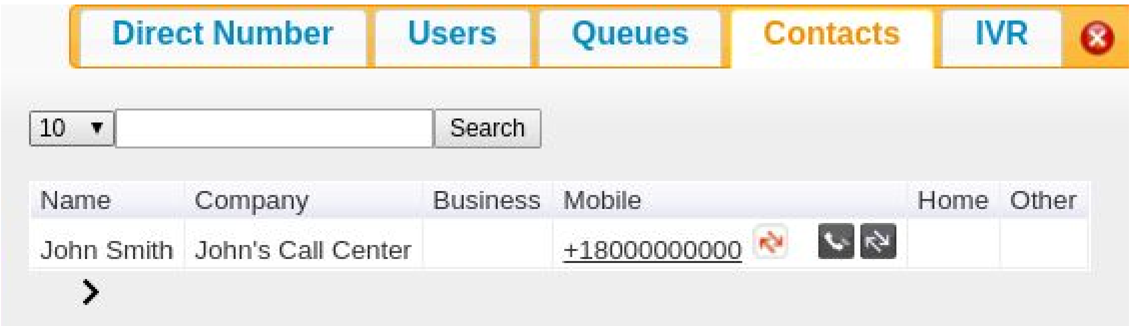


The illuminated in redline 1 will transition to gray:



Contacts

1. To transfer a call to contact, click the contacts tab Contacts . The following screen will be shown below:



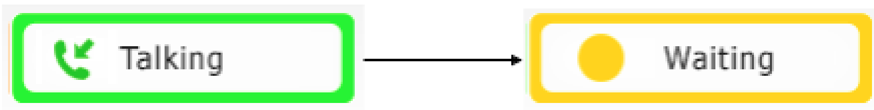
Transfer with speaking

1. Click the search input, type the desired contact's name, as shown below:

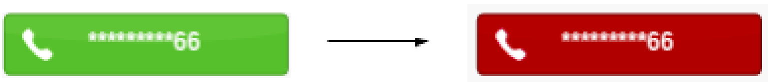
2. Click the call button,  located under the mobile column, for the desired contact.

   The following will take place:

The talking status will transition to the waiting status, as shown below:



Line 1 will be placed on hold:

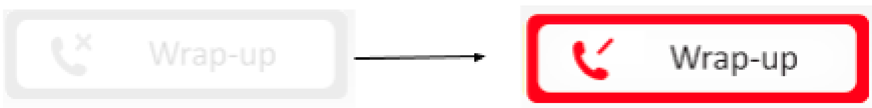


Line 2 will illuminate in green:

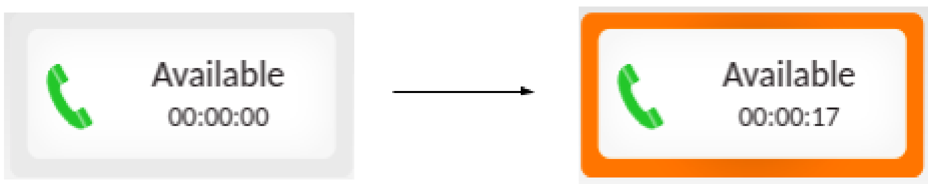
3. Once Line 2 answers the phone, the agent can explain the situation to the contact on line 2.

4. After explaining the situation, click the transfer button,  located to the right of the call button , the transition will take place:

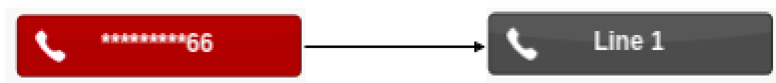
Wrap-up call status will illuminate:



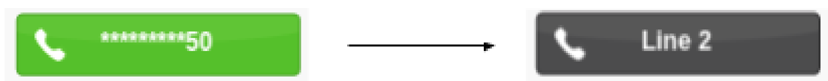
The available button will illuminate again in orange (timer will begin again for available status):



The illuminated in redline 1 will transition to gray:



The illuminated in green line 2 will transition to gray:

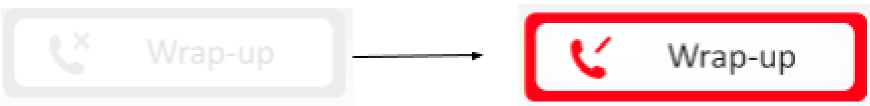


Transfer without speaking

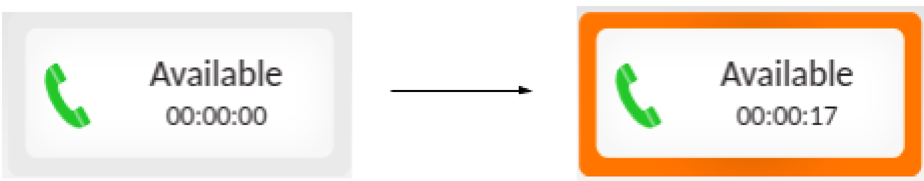
1. Click the search input, type the desired contact's name, as shown below:

2. Click the transfer button,  located under the Transfer without speaking column, for the desired user. The following will take place:

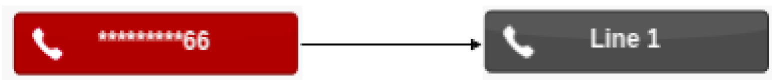
Wrap-up call status will illuminate:



The available button will illuminate again in orange (timer will begin again for available status):



The illuminated in redline 1 will transition to gray:

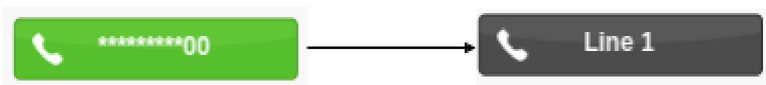


IVR

1. To transfer a call to an IVR, click the contacts tab IVR. The screen below shows some IVR examples:

2. Click the radio button, , for the desired IVR.
3. Click the transfer button, . The following transitions will occur:

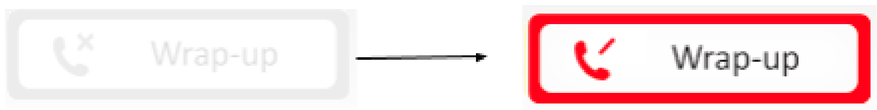
The illuminated in green line 1 will transition to gray:



The Call Timer will stop the call, as shown below:

Note: The call timer will display the most recent call time.

Wrap-up call status will illuminate:



<u>Making a Conference Call</u>

Conference calls are used so that the agent can talk to two people at the same time, such as a supervisor and a customer. There are two ways to perform a conference call:

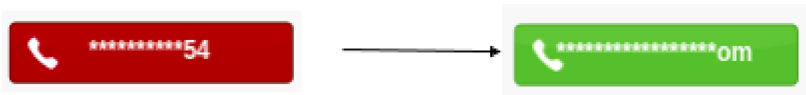
- Using the Transfer button
- Using Line 2 directly

<u>*Using the Transfer button*</u>

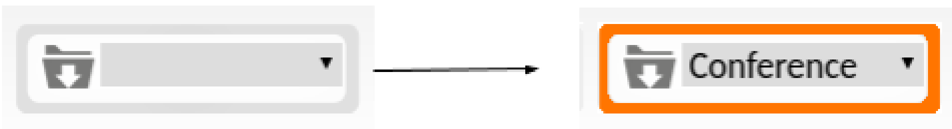
1. After placing or receiving a call on line 1, click the transfer button (any of the transfer methods that provide a transfer with speaking option can be used, See *Performing a Call Transfer Section*)
2. After line 2 is in talking status (do not hit the transfer button), click the conference button, 

, the following transitions will take place:

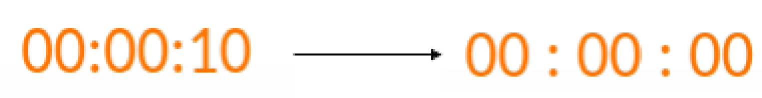
Line 1 will change to green, indicating that the conference call is now active on line 1:



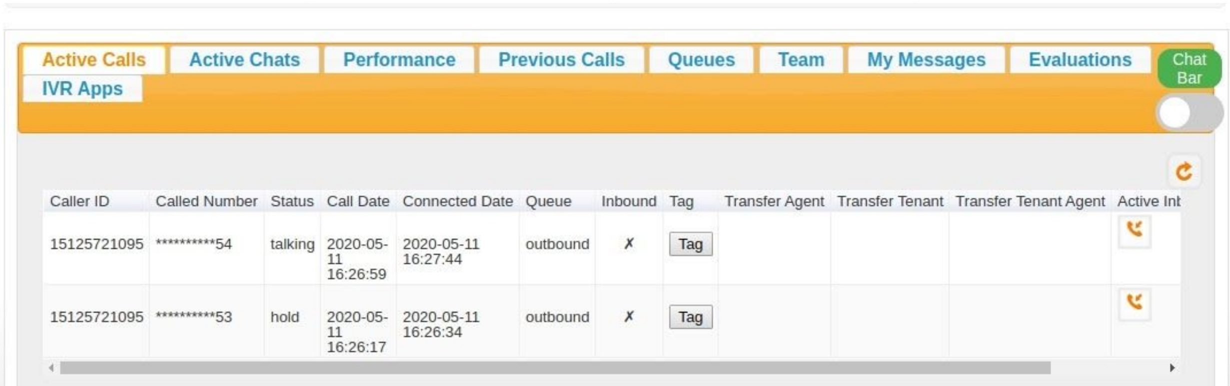
The grey status folder will indicate that a conference is taking place:



The timer will restart for the conference call:



The Active calls will be displayed like the example below:



Note: The statuses of both lines. Line 2 states hold because both lines are now on line 1 in conference mode.

<u>*Using Line 2 Directly*</u>

1. After placing or receiving a call on line 1, click the hold button,  .
2. Click, Line 2, 

.
3. Click the phone number input box, 

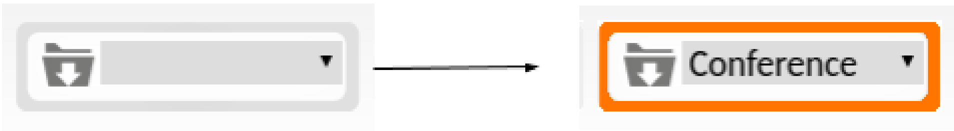
, type the desired phone number using the Dialer (as displayed in the softphone image) or a computer keyboard, an example is shown below:

4. Once Line 2 's in taking status, click the conference button, 

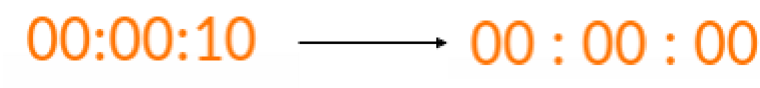
, the following transitions will take place:

Line 1 will change to green, indicating that the conference call is now active on line 1:

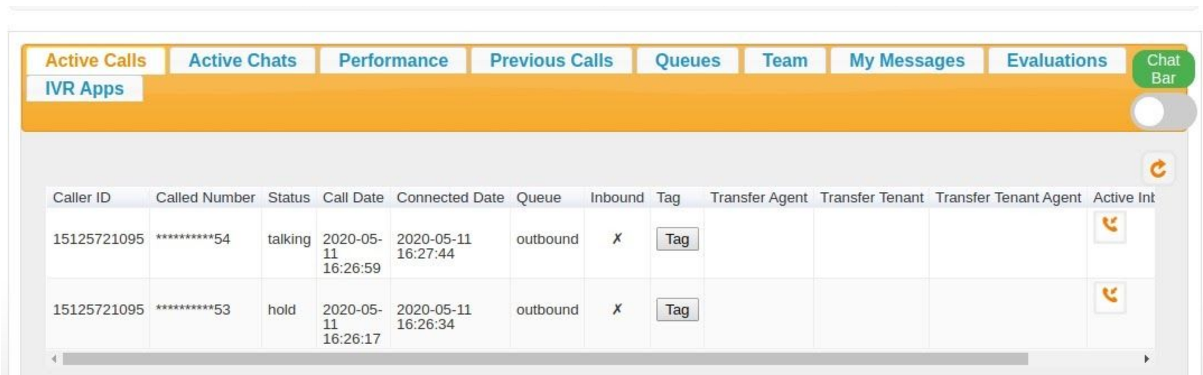
The grey status folder will indicate that a conference is taking place:



The timer will restart for the conference call:



The Active calls will be displayed like the example below:

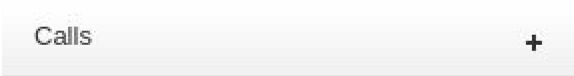


Note: The statuses of both lines. Line 2 states hold because both lines are now on line 1 in conference mode.

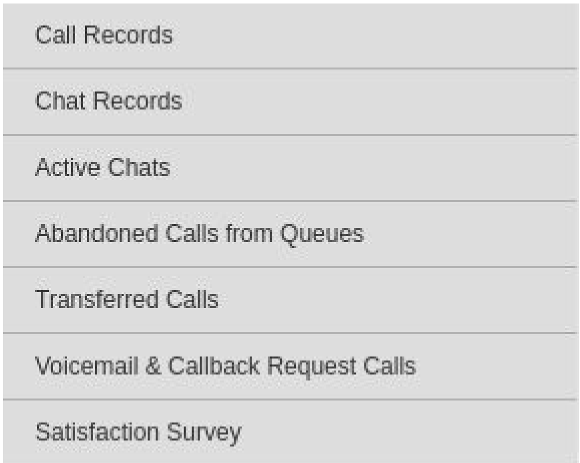
Quality Control Screen

The quality control screen is used to view calls and chats (active and non-active), transfers, voicemails, and satisfaction surveys. Call records can also be listened to here. Also, this data can be reviewed to determine proper agent performance.

Calls Tab

By clicking the calls tab, 

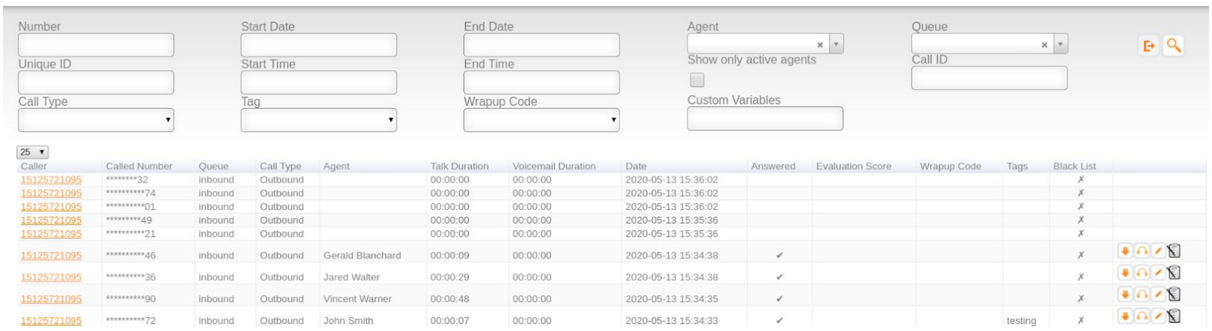
, the following information can be viewed:



Each of these tabs is discussed in detail below:

Call Records

The call records screen is shown below:



Exporting Call Records

1. Click the export button, , located in the top right-hand corner to the left of the search button, .
2. The file will be downloaded in .CSV format.

Note: using the records filter, 

, up to a 100 call records can be shown on a single page in the call center studio tenant

Searching Call Records

Call Records can be searched in multiple different ways:

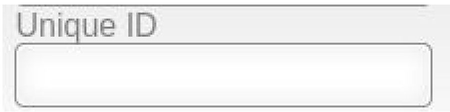
Number

1. Click the “Number” input box, type the desired phone number of the call records. An example is shown below:

2. Click the search button, .

Unique ID

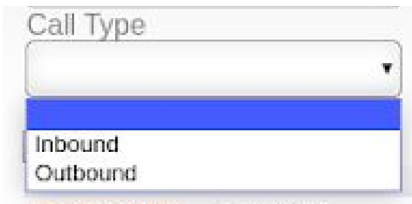
1. Click the Unique ID input box, type the unique ID an example is shown below (The Unique ID can be found in the Reporting tab under Call Details, once the report is downloaded via .CSV, the unique call ID, will be shown. The unique ID can also be used to match the call records to the CRM used):



2. Click the search button,  .

Call Type

1. Click the Call Type input box. The following dropdown list will appear:

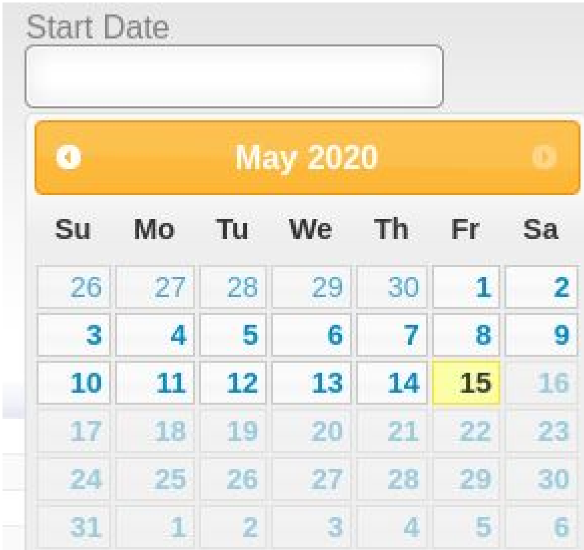


2. Make a selection from the dropdown list.

3. Click the search button,  .

Start Date

1. Click the start date input box. The following calendar pop-up window will appear:

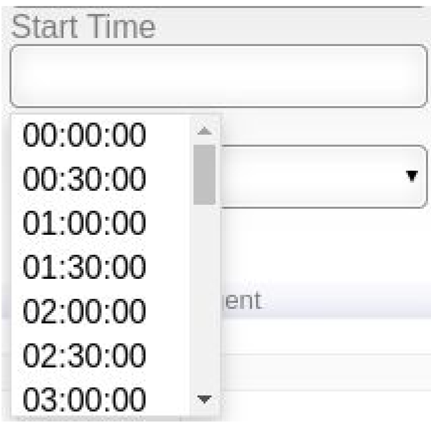


2. Click the desired start date

3. Click the search button,  .

Start Time

1. Click the start time input box. The following dropdown list will appear:

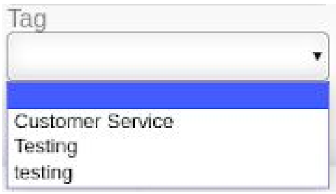


2. Select the desired start time.

3. Click the search button,  .

Tag

1. Click the tag input box, an example dropdown menu with tags is shown below:

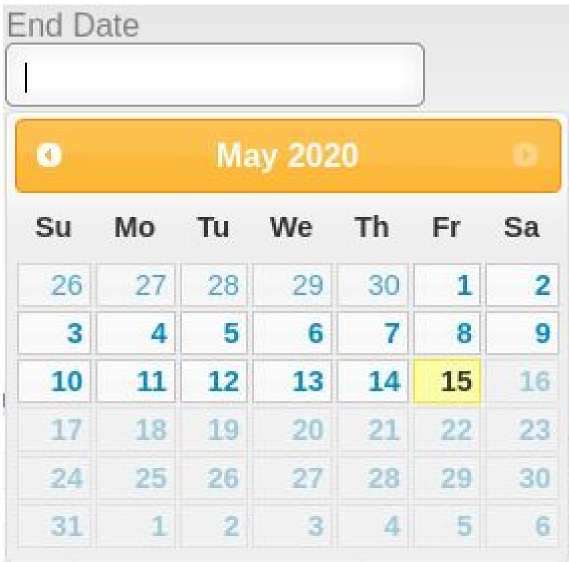


2. Select the desired tag.

3. Click the search button,  .

<u>*End Date*</u>

1. Click the end date input box. The following calendar pop-up window will appear:

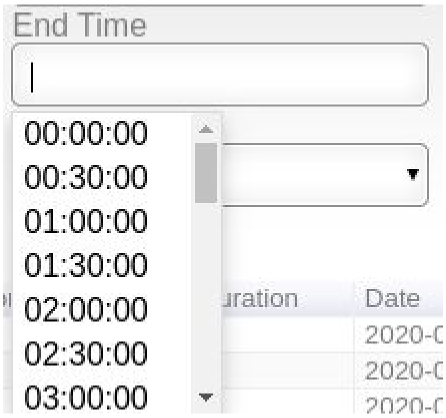


2. Click the desired end date

3. Click the search button,  .

End Time

1. Click the end time input box. The following dropdown list will appear:

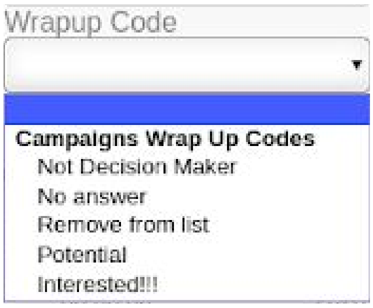


2. Select the desired end time.

3. Click the search button,  .

Wrapup Codes

1. Click the wrapup codes input box. An example dropdown list is shown below:

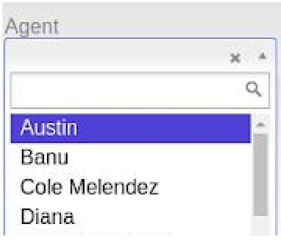


2. Select the desired wrapup code.

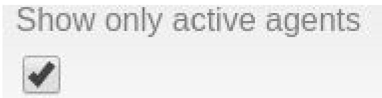
3. Click the search button,  .

Agent

1. Click the agent input box. An example dropdown list is shown below:



Note: Only active agents can be filtered by checking the "Show only active agents" checkbox shown below:



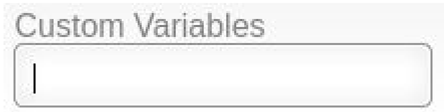
2. Select the desired agent

3. Click the search button,  .

Custom Variables

The custom variable is used for integrations via web service. For example, if the tenant uses a number masking web service, each agent has a unique ID. This ID can be searched for using this search box.

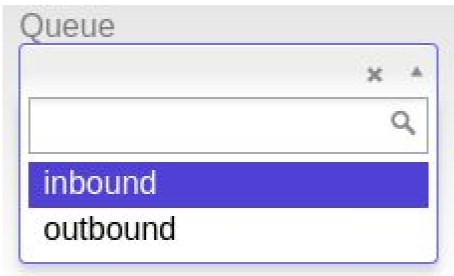
1. Click the custom variables input box.
2. Type the desired custom variable. The input box is shown below:



3. Click the search button,  .

Queue

1. Click the queue input box. A dropdown list will appear. An example is shown below:



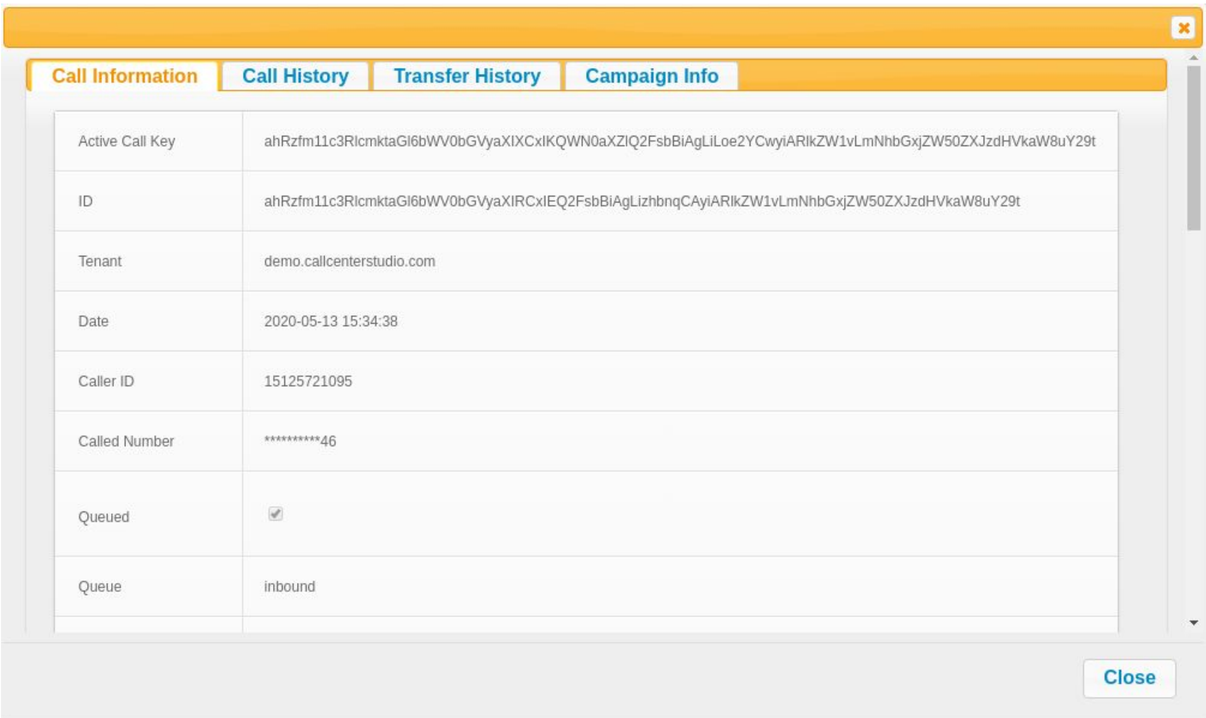
2. Click the desired queue.
3. Click the search button,  .

Call ID

1. Click the Call ID input box.
2. Type the desired call ID (Created when the call is passed through the system, can be found in Accessing Call Details > Active Call Key).
3. Click the search button,  .

Accessing Call Details

1. Under the Caller column, click the desired caller number highlighted in orange for more details. The following pop-up screen will be displayed:



Call Information

Under the call information tab, the row headings are explained in detail below:

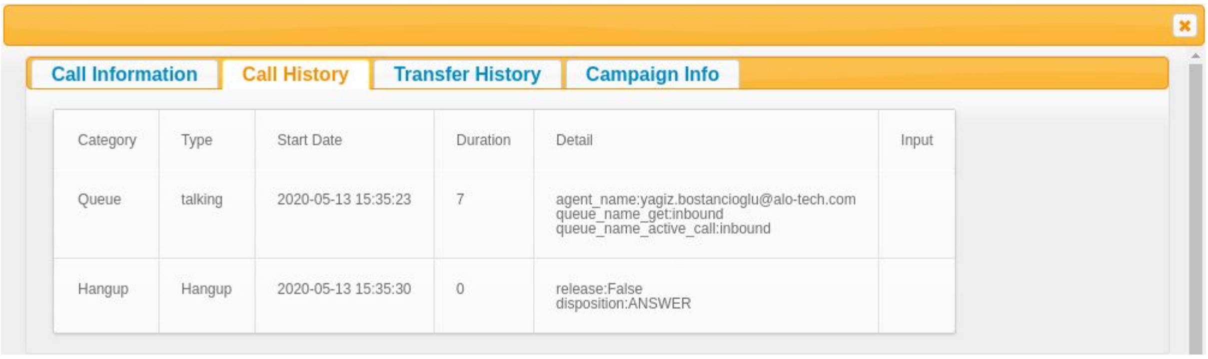
Active Call Key	When a call starts, the application creates a unique key specific to that call.
ID	ID similar to Active Call Key logged for the call.
Tenant	Provides the URL name for the demo tenant
Date	Provides the date and time of the incoming call in the following format: YYYY-MM-DD HH:MM:SS
Caller ID	Provides agents phone numbers used for the call
Called Number	Provides the called number in the following format: *********XX
Queued	Displays a checkbox showing whether the call was queued or not.
Queue	Displays the name of the queue used by the agent
Call Type	Displays whether the call was inbound or outbound.
Queue Date	If the call was queued, the date and time will be displayed in the following format: YYYY-MM-DD HH:MM:SS

Assigned	Not every call has to be queued. The call may not enter a queue in the IVR to which the dialed number is forwarded. For example, if there is no queue step or for some reason such as there may be a bug, dialed out of office, etc., the call will not be queued. This checkbox indicates whether the call is queued.
Agent	Gives the name of the agent
Waiting Duration	The waiting duration is the amount of time the customer waited before connecting with an agent. (In seconds).
Answered	Shows whether the call was answered or not using a checkbox
Answered in SL	Based on the defined SL in Queues Section. For example, if the defined SL was 20 seconds, and the waiting duration was 15 seconds, this checkbox would be checked because it was answered in the defined SL.
Answer Date	Provides the date and time of the answered call in the following format: YYYY-MM-DD HH:MM:SS
Hang up Date	Provides the hangup date and time of the call in the following format: YYYY-MM-DD HH:MM:SS
Duration	Gives the call duration time.
Hold Count	The Hold count is the number of times the agent placed the customer on hold.
Hold Duration	Gives the total hold duration time

Local Release	If the agent hung up, “True” will be displayed. If the customer hung up, “False” will be displayed.
Abandoned	If the call rang on the agent screen, but the agent did not answer the call
Short Call	Based on the defined Short Call duration in Queues Section. For example, if the defined Short Call duration was 20 seconds, and the total talk time was 30 seconds, then the output would be “False” because it was longer than the short call duration.
Recording Uploaded	Displays a checkbox to show if the call recording was uploaded correctly.
Avg. Evaluation Score	Gives the agent’s average evaluation score if the supervisor made an evaluation.
Tags	If an agent or supervisor tagged the call, the tag will be displayed here.
Location	If the Queue used has a location assigned to it, then the location name will be displayed here.
Simulated Call	The administrator can make simulated calls. If a simulated call is performed, then the output will be “True.”
Simulation Date	If the simulated call output is “True,” then the simulated call date will be displayed.

Call History

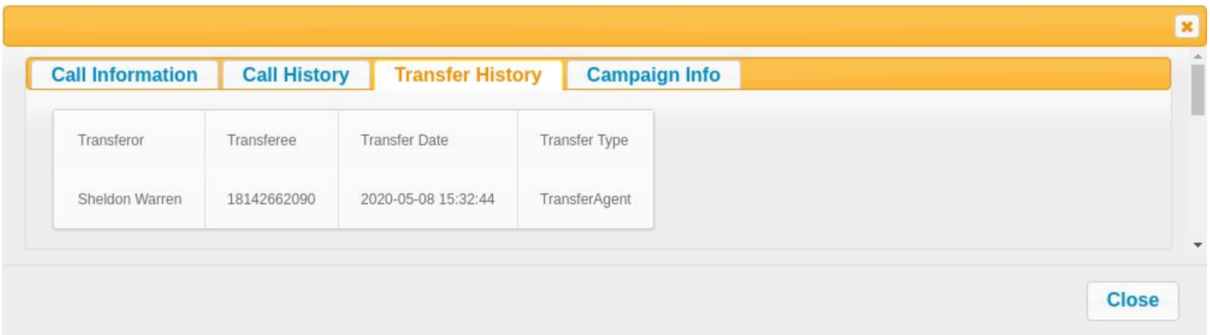
By clicking the call history tab, **Call History**, the following screen will be displayed:



Under the call history tab, information can be found, such as the call start time, duration, and when the call was disconnected.

Transfer History

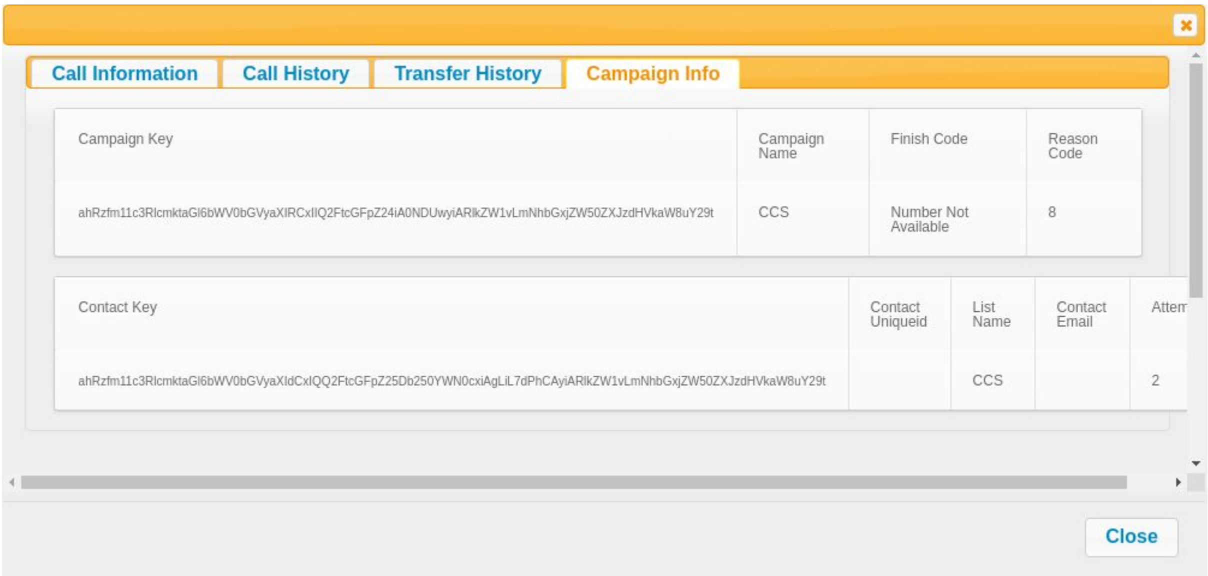
By clicking the transfer history tab, **Transfer History**, the following screen will be displayed:



Tab information can be found under the transfer history, such as the transferor's name, transferee’s name, the transfer date, and the transfer type.

Campaign Info

By clicking the campaign info tab, **Transfer History** , the following screen will be displayed:



Under the campaign, info tab information can be found, such as the campaign key, campaign name, finish code, reason code, contact key, list name, contact email, and the number of attempts.

Call Recordings

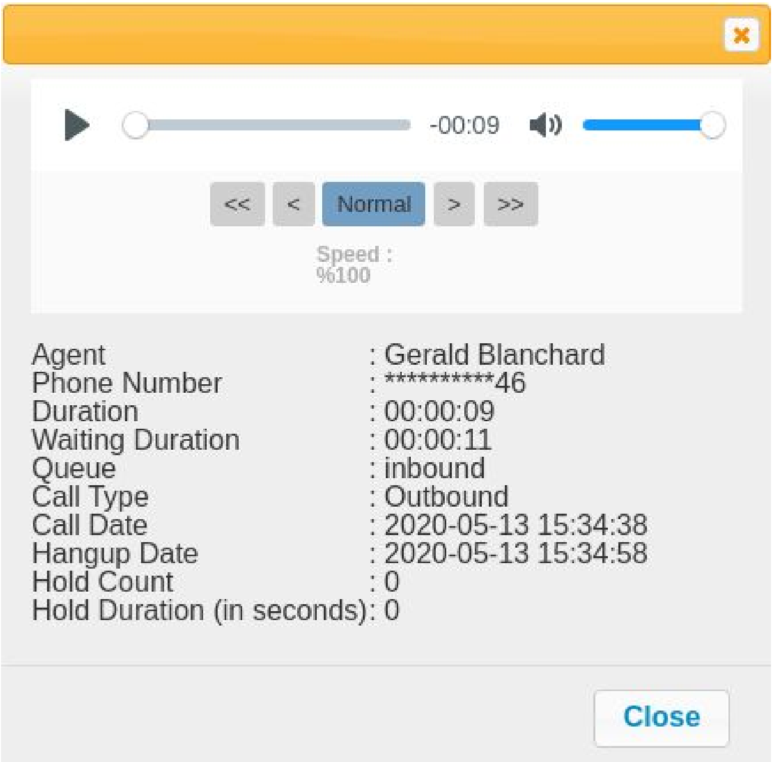
All calls are recorded by default when the call is in talking status. Recordings can be accessed by using the following buttons to the right of the call's row.

Downloading a Call Recording

1. Click the download button, , located to the right of the blacklist column.

Listening to a Call Recording

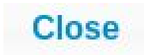
1. Click the listen button, , located to the right of the download button, , the following pop-up will be displayed:



2. Click the play button, , to listen to the recording.

Note: recording speed can be adjusted (Between 50% and 150%) using the bar shown below:

Note: volume can be adjusted using the bar shown below:

3. To exit the pop-up window, click the close button, 

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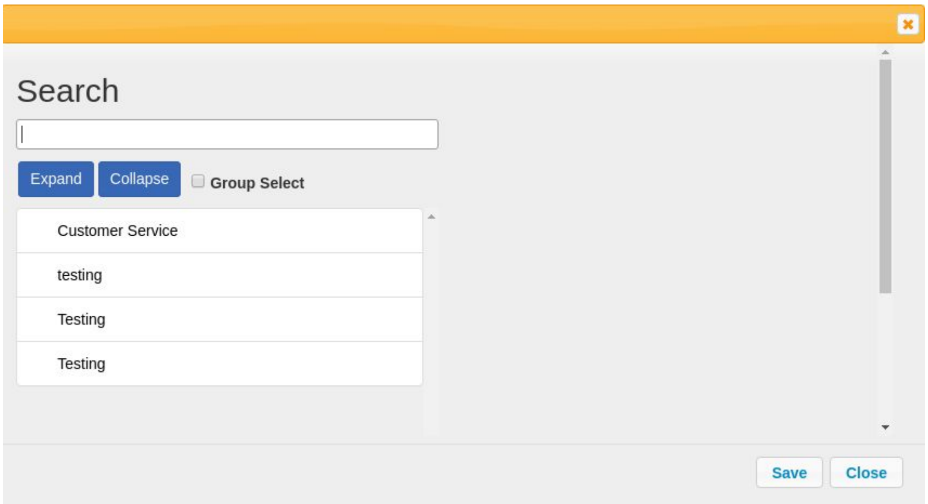
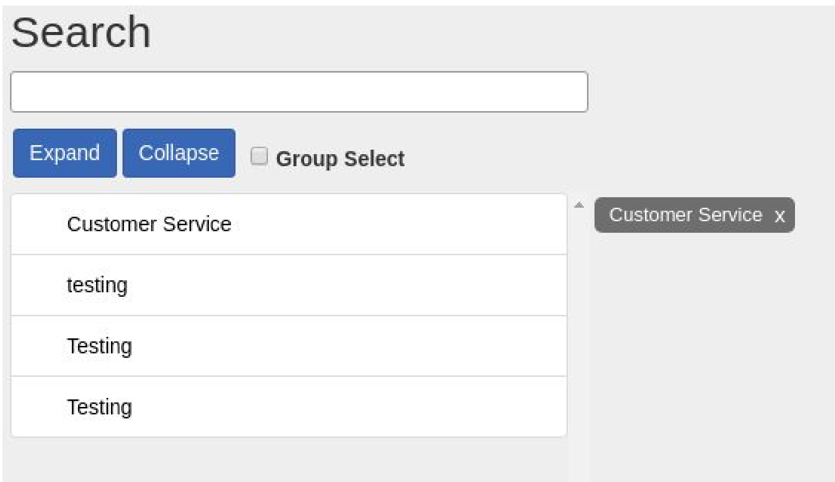
Tagging a Call

1. Click the tag button, , located to the right of the listen button, , the following pop-up will be displayed:



2. A list of created tags will be displayed. If multiple tags are used, the search input box can be used. Select the desired tag or tags from the tag list (Group tag selections can be made by clicking the Group Select checkbox. Once a tag has been selected, it will be displayed on the right of the tag listings as shown below:



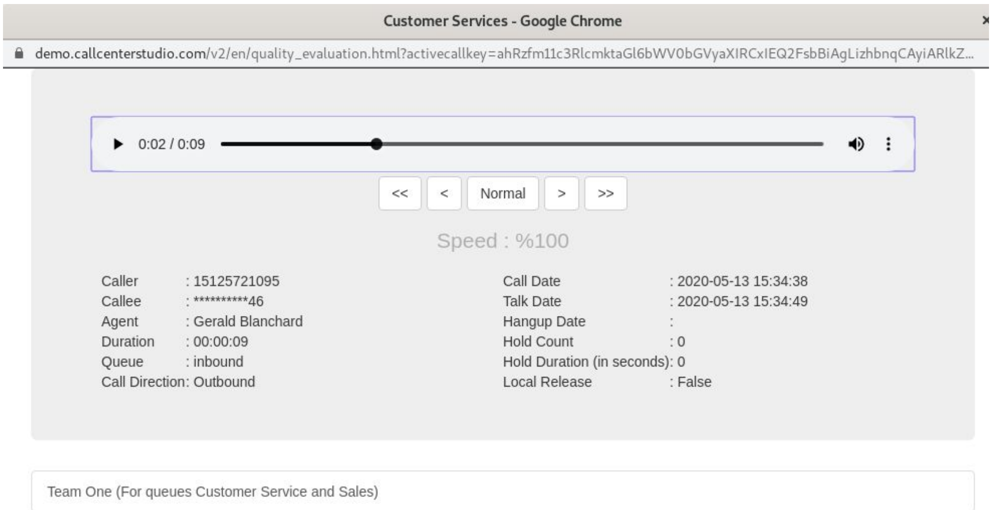
Note: Tags can be deselected from the call by clicking the X to the right of the tag's name.

3. Once all the desired tag selections have been made, click the save button, Save.

Note: More tags can be added while on the call if necessary by repeating steps 1 - 3. Also, previous tags that could not be changed by the agent and supervisor can be modified here.

Evaluating a Call

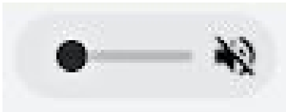
1. Click the evaluate button, , located to the right of the tag button, , the following pop-up will be displayed:



Note: An example evaluation was created (See Evaluations in the Administrator section).

Recording speed can be adjusted (Between 50% and 150%) using the bar shown below:

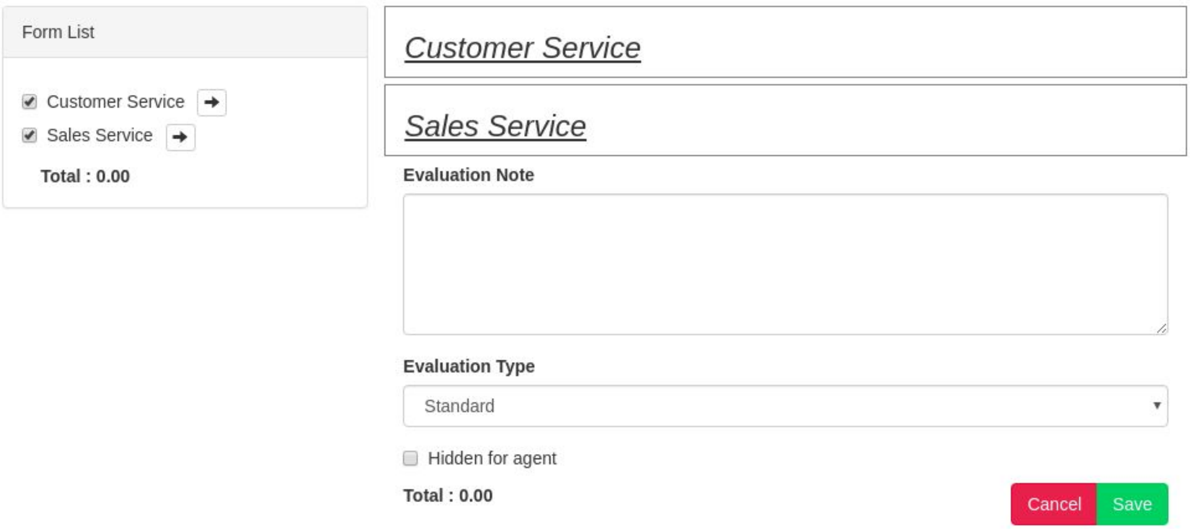
Volume can be adjusted by clicking and using the bar, as shown below:



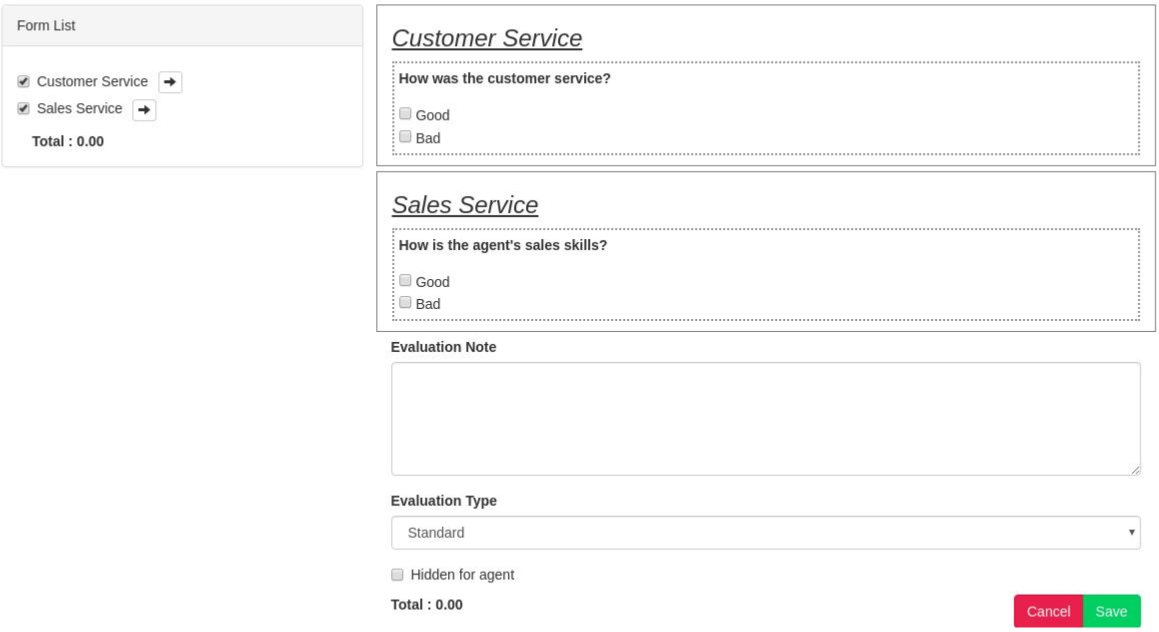
Call Recording can be downloaded by clicking the three vertical dots, , to the right of the volume button, . And then clicking download as shown below:

2. Click the evaluation desired an example survey is shown below:

3. After clicking, the evaluation will be visible. The example is shown below:



Note: If multiple forms are built into the evaluation, each form has to be clicked to expand each section. The expanded example form is shown below:



4. Fill out the necessary information on the form.

Note: By clicking the "Hidden for agent" checkbox, 

, the evaluation will not be able to be seen by the agent.

Note: On evaluation type, there are two types in the dropdown box:

Standard - Used for evaluating the agent

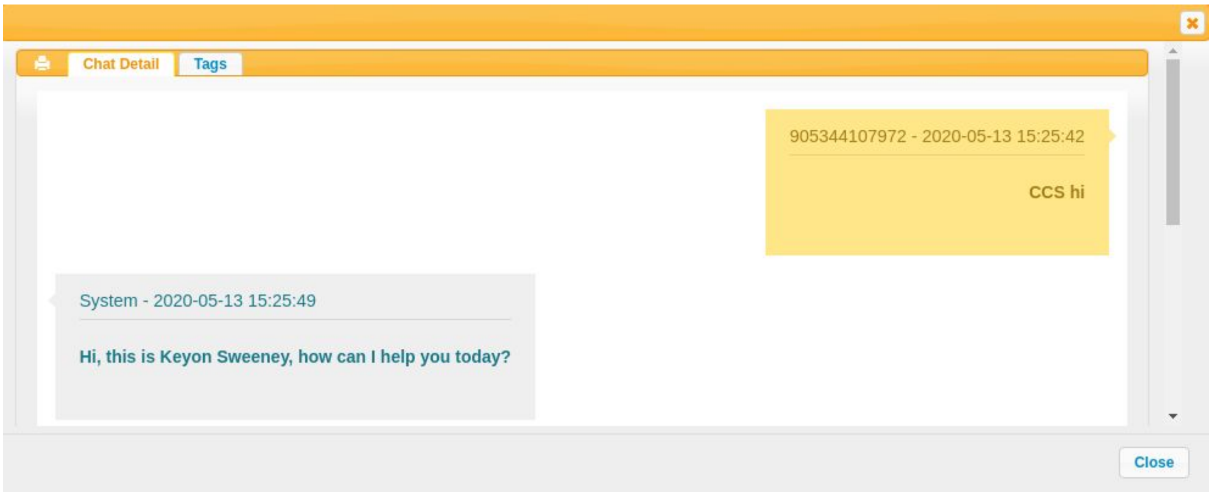
Control - Used to reevaluate the agent based on a customer concern.

5. Click the save button, 

.

Chat Records

Under the insert date column, click the desired chat insert date highlighted in orange for more details. The following pop-up screen will be displayed:



Chat Detail

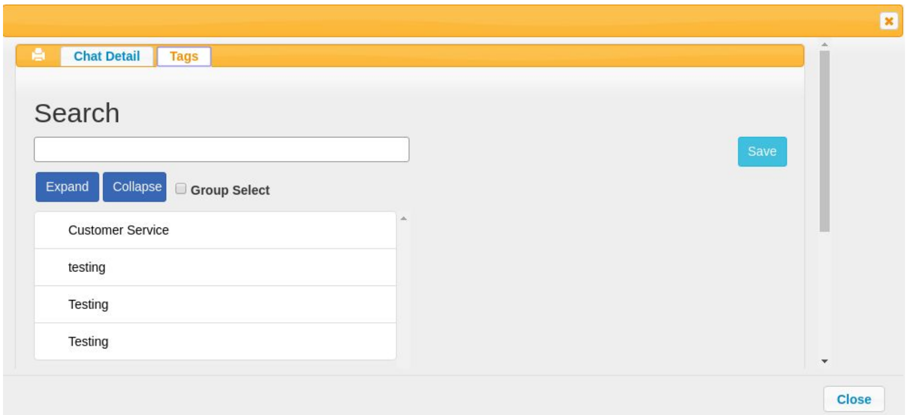
The chat detail screen displays the chat in detail with customer and agent responses.

Note: The chat can be printed by selecting the print button, , located in the top left corner.

Tags

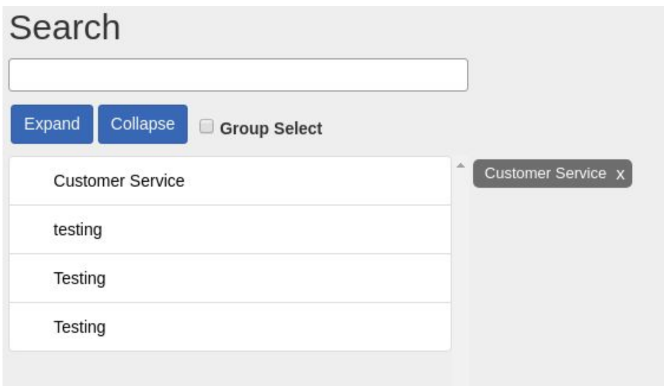
By clicking the Tags tab, 

, the following screen will be displayed:



Note: A call can also be tagged, by clicking on the tag button,  *, to the right of the subject column from the main Chat Records screen.*

1. A list of created tags will be displayed. If multiple tags are used, the search input box can be used. Select the desired tag or tags from the tag list (Group tag selections can be made by clicking the Group Select checkbox. Once a tag has been selected, it will be displayed on the right of the tag listings as shown below:



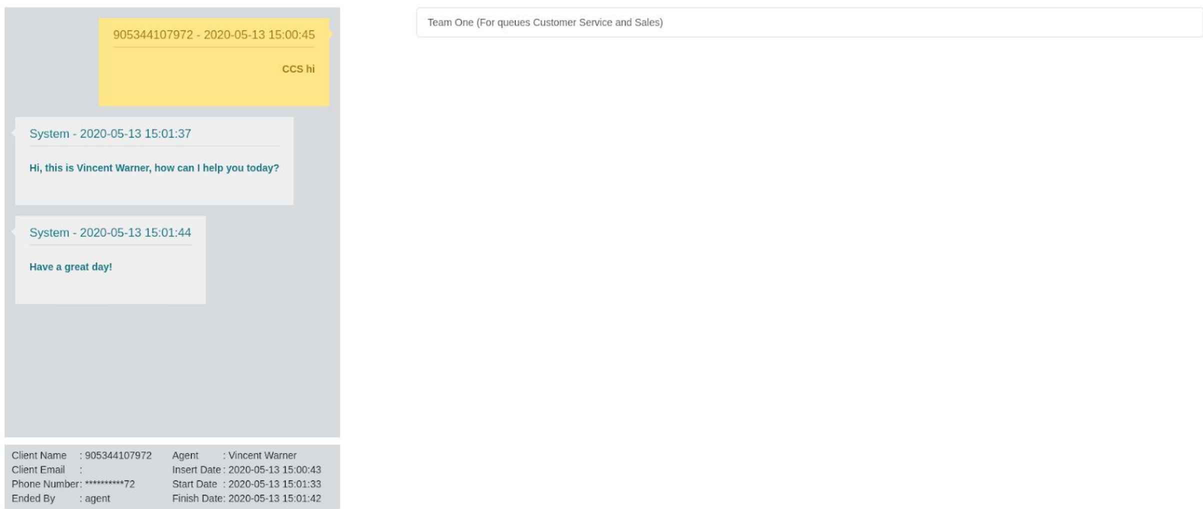
Note: Tags can be deselected from the call by clicking the X to the right of the tag's name.

2. Once all the desired tag selections have been made, click the save button, Save.

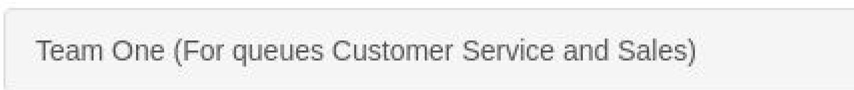
Note: More tags can be added while on the call if necessary by repeating steps 1 - 3. Also, previous tags that could not be changed by the agent and supervisor can be modified here.

Evaluating a Chat Record

1. Click the evaluate button, , located to the right of the tag button, , the following pop-up will be displayed:



2. Click the evaluation desired an example survey is shown below:



3. Fill out the necessary information on the form.

Note: By clicking the "Hidden for agent" checkbox, 

, the evaluation will not be able to be seen by the agent.

Note: On evaluation type, there are two types in the dropdown box:

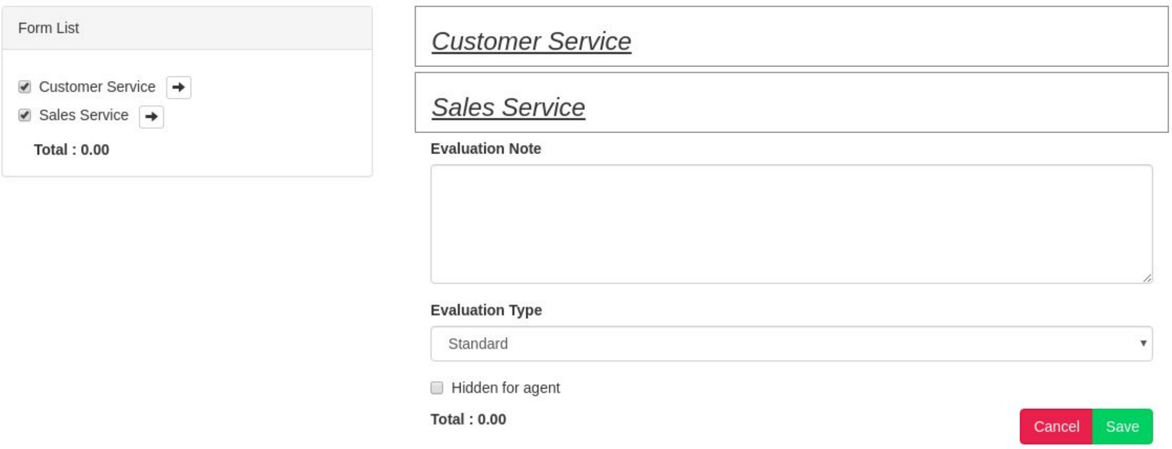
Standard - Used for evaluating the agent

Control - Used to reevaluate the agent based on a customer concern.

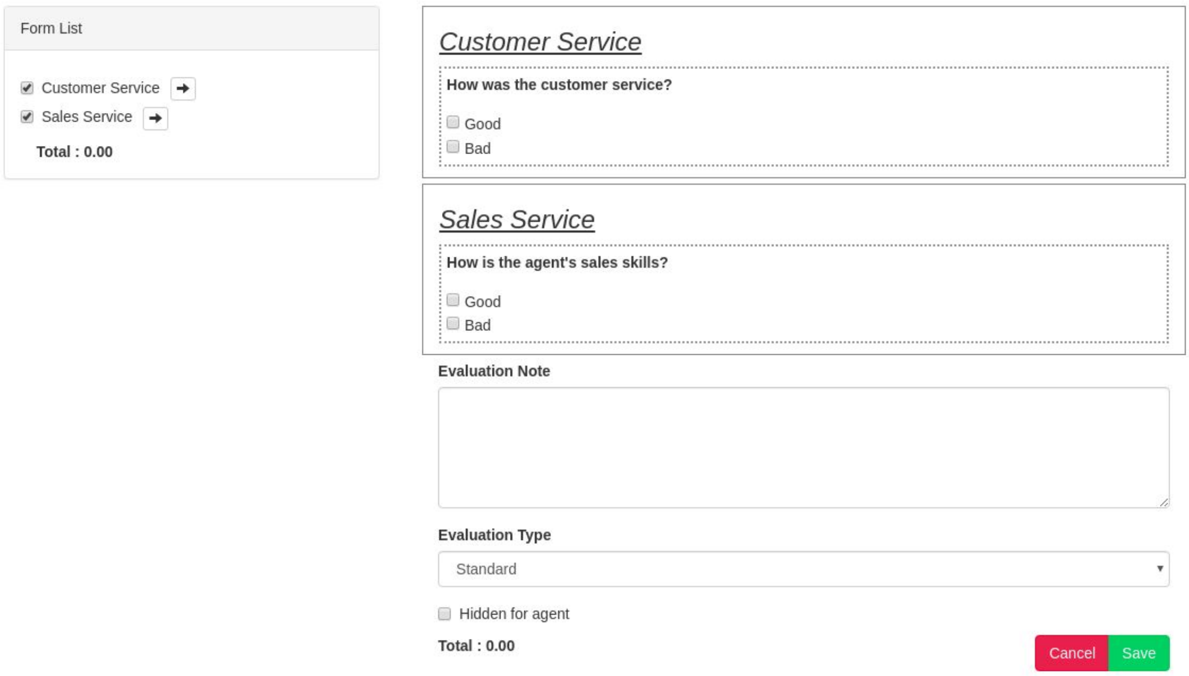
4. Click the save button, 

.

5. After clicking, the evaluation will be visible. The example is shown below:



Note: If multiple forms are built into the evaluation, each form has to be clicked to expand each section. The expanded example form is shown below:



Active Chats

Active chats can be viewed in the active chats tab. Information on the chat, such as start date and time, agent name, client name/phone number, client email, queue, status, parking start date, and duration, can be viewed in the active chats list.

Closing an Active Chat

1. Click the close button, , located to the right of the duration column, once clicked the following pop-up window will appear:

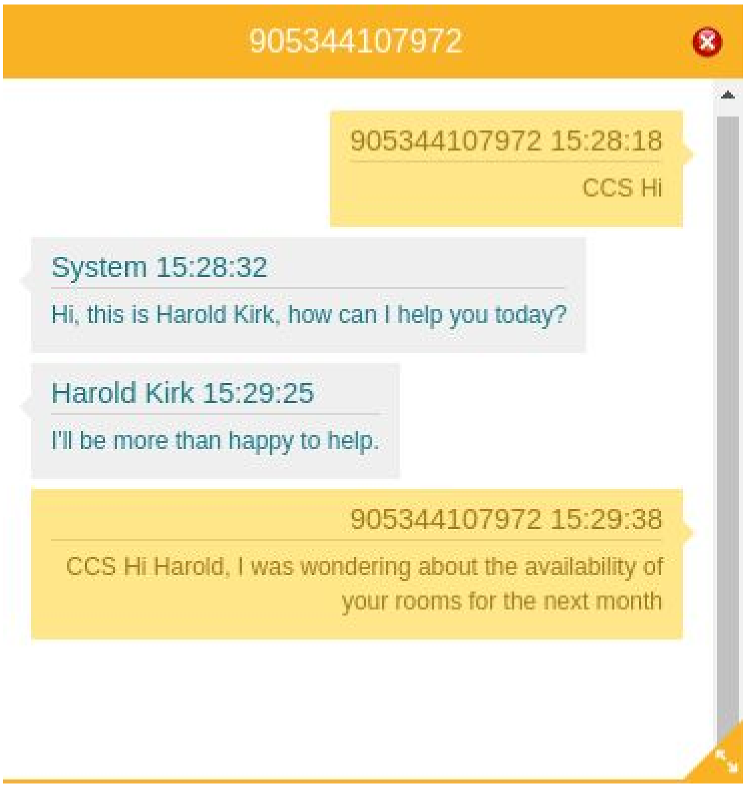
- *Select the cancel button, , to cancel the chat from being closed.*
- *Select the OK button, , to confirm the closing of the chat.*

2. Confirm by clicking the OK button, .

The screen will reload, and the closed chat will not be shown.

Viewing an Active Chat

1. Click the view/details button, , located to the right of the close button, , the following pop-up will appear:



2. Once viewing is complete, click the exit button, , to return to the active chat list.

Viewing Active Chats on Parking Status

In the top left corner of the Active chat list check the "Show Only Parking Status" checkbox as shown below:

Note: Only chats on parking status can be viewed when this checkbox is checked. Parking status is used so that the agent can park a chat to continue at a later point in time when the customer begins to chat again.

Abandoned Calls from Queues

Searching Abandon Calls from Queues

There are seven ways to search for abandon calls from queues explained below:

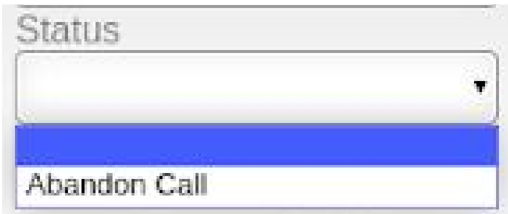
Number

1. Click the Number input box, type the desired phone number of the call records. An example is shown below:

2. Click the search button,  .

Status

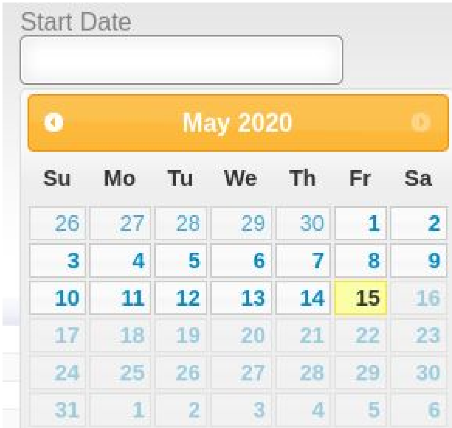
3. Click the Status dropdown box, select "Abandon Call" as shown below:



4. Click the search button,  .

Start Date

1. Click the start date input box. The following calendar pop-up window will appear:

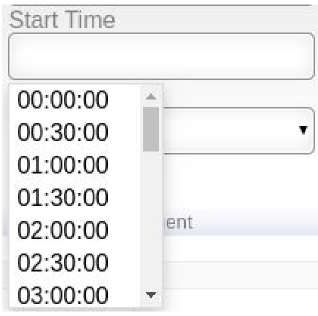


2. Click the desired start date

3. Click the search button,  .

Start Time

1. Click the start time input box. The following dropdown list will appear:

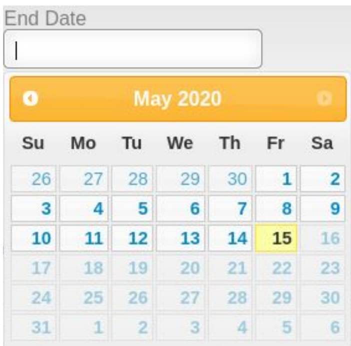


2. Select the desired start time.

3. Click the search button,  .

End Date

1. Click the end date input box. The following calendar pop-up window will appear:

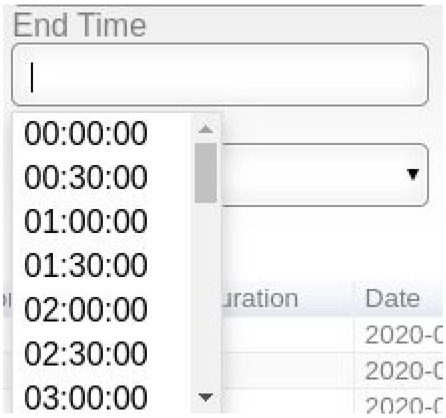


2. Click the desired end date

3. Click the search button,  .

End Time

1. Click the end time input box. The following dropdown list will appear:

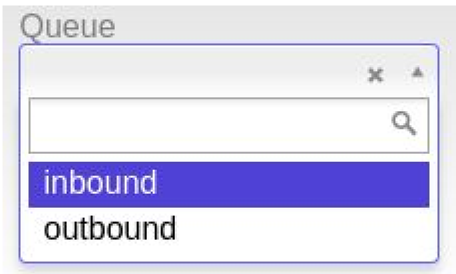


2. Select the desired end time.

3. Click the search button,  .

Queue

1. Click the queue input box. A dropdown list will appear. An example is shown below:



2. Click the desired queue.

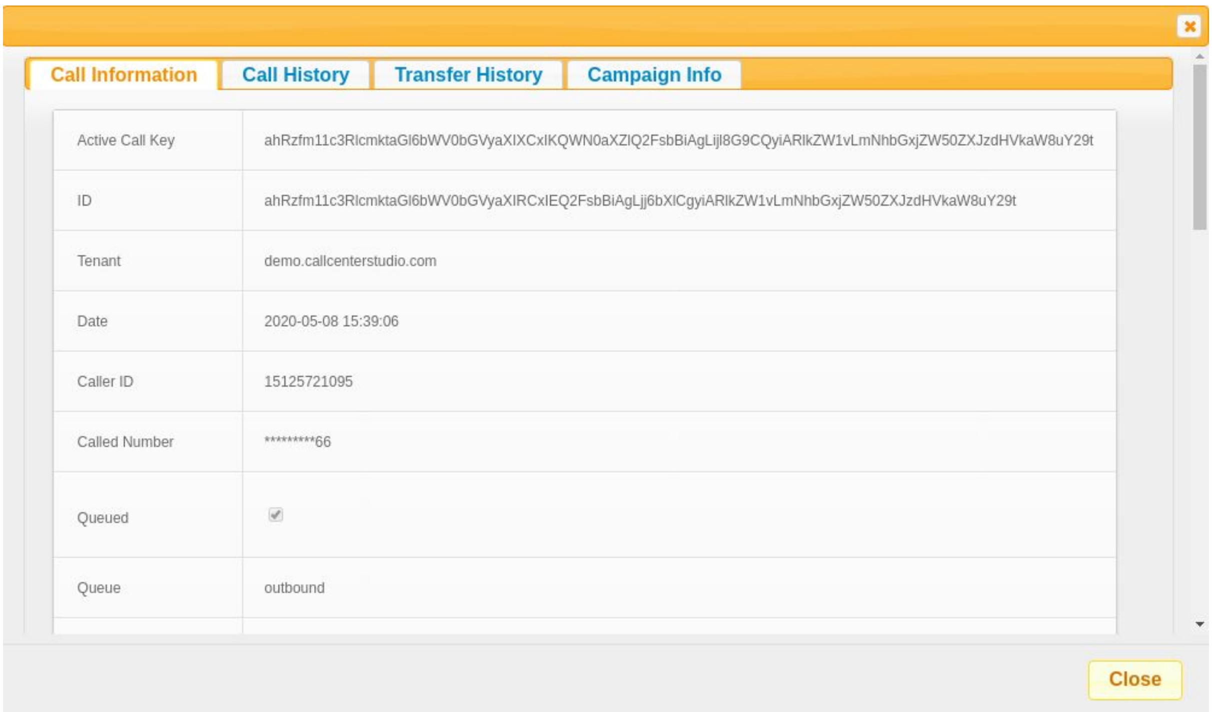
3. Click the search button,  .

Transferred Calls

Transferred can be viewed in the assigned calls tab. Information on the transfer such as transfer date and time, custom ID, transferor, transferee, transfer type, initial queue, and last-agent-spoken-to can be viewed in the transferred calls list.

Accessing Transfer Details

1. Click the info button, i , located in the detail column for the desired transfer. The following pop-up window will appear:



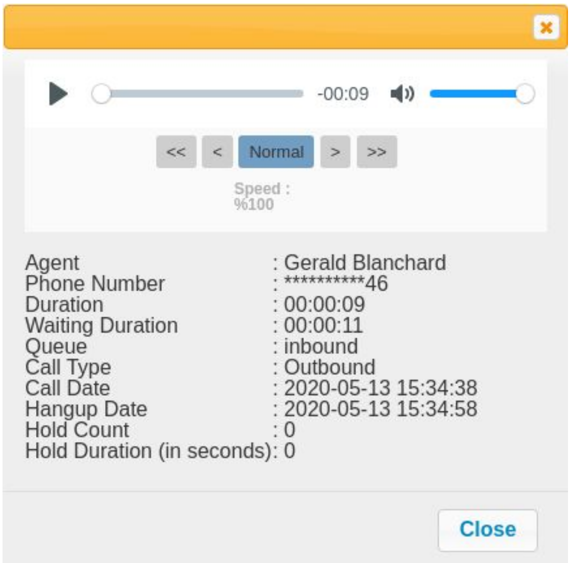
Note: For more information on this pop-up window, see ***Call Information, Call History, Transfer History, and Campaign Info Sections*** *found under Accessing Call Details.*

Downloading a Transferred Call Recording

1. Click the download button, , located to the right of the blacklist list column.

Listening to a Transferred Call Recording

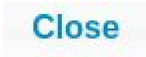
1. Click the listen button, , located to the right of the download button, , the following pop-up will be displayed:



2. Click the play button, , to listen to the recording.

Note: recording speed can be adjusted (Between 50% and 150%) using the bar shown below:

Note: volume can be adjusted using the bar shown below:

3. To exit the pop-up window, click the close button, 

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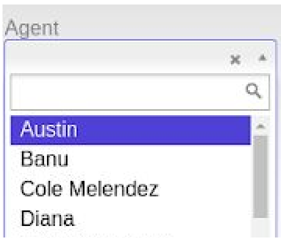
Searching Transferred Calls

There are six ways to search for transferred calls, as shown below (more than one search feature can be used at the same time):

Agent

1. Click the agent input box. An example dropdown list is shown below:



2. Select the desired agent

3. Click the search button,  .

<u>Transfer Type</u>

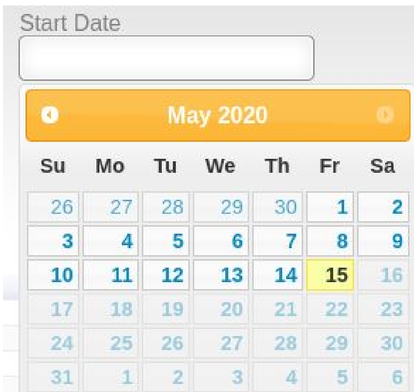
1. Click the transfer type input box. A dropdown list will appear. An example list is shown below:

2. Select the desired transfer type.

3. Click the search button,  .

<u>Start Date</u>

1. Click the start date input box. The following calendar pop-up window will appear:

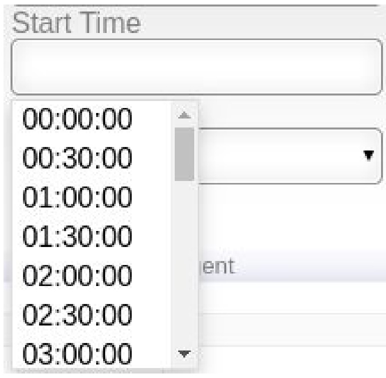


2. Click the desired start date

3. Click the search button,  .

Start Time

1. Click the start time input. The following dropdown list will appear:

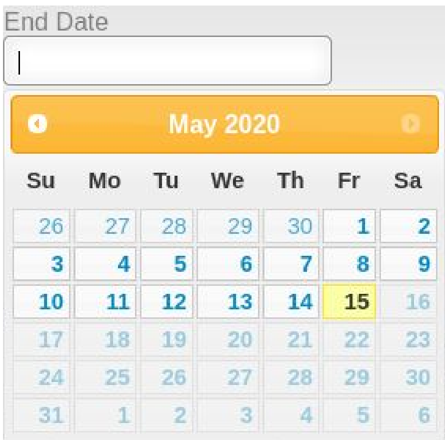


2. Select the desired start time.

3. Click the search button,  .

End Date

1. Click the end date input box, the following calendar pop-up window will appear:

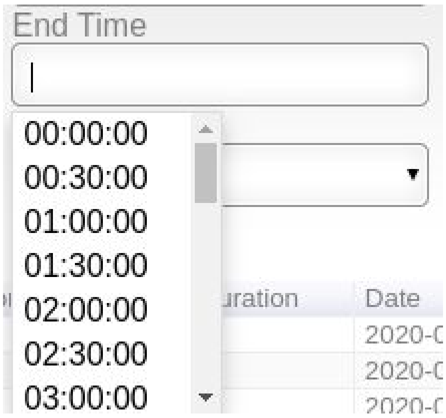


2. Click the desired end date

3. Click the search button,  .

End Time

1. Click the end time input box, the following dropdown list will appear:

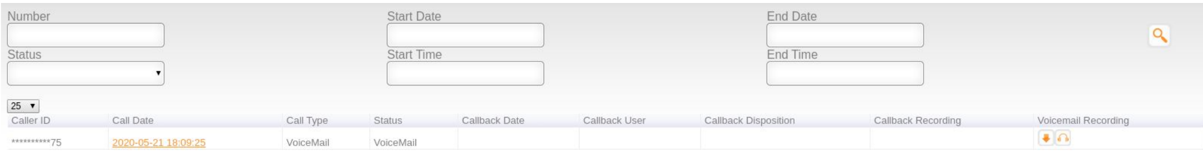


2. Select the desired end time.

3. Click the search button,  .

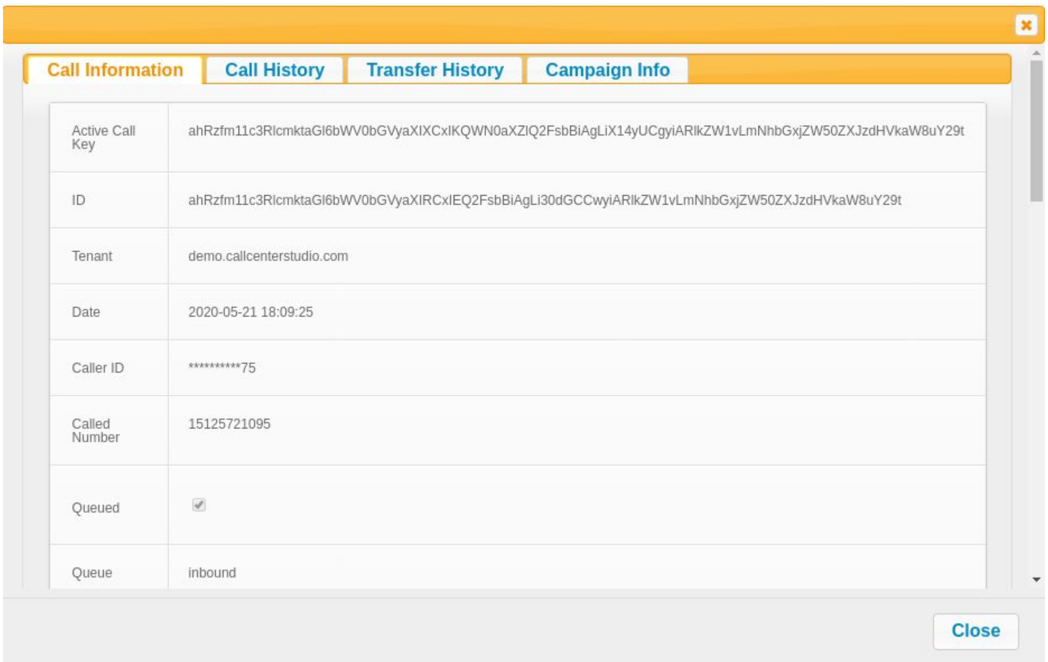
Voicemail & Callback Request Calls

The Voicemail & Callback Request Screen is shown below:



Accessing Voicemail & Callback Request Details

1. Click the desired orange highlighted date located under the Call Date column. The following pop-up will appear:



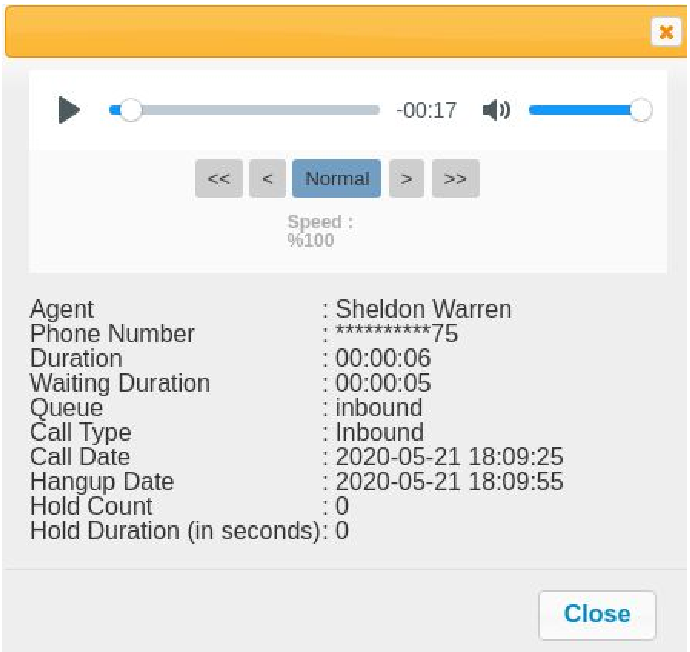
Note: For more information on this pop-up window, see ***Call Information, Call History, Transfer History, and Campaign Info Sections*** *found under Accessing Call Details.*

__Downloading a Voicemail / Callback Request Recording__

1. Click the download button, , located in the Voicemail recording column.

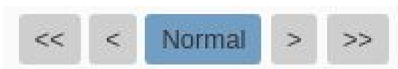
__Listening to a Voicemail / Callback Request Recording__

1. Click the listen button, , located to the right of the download button, , the following pop-up will be displayed:

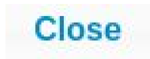


4. Click the play button, , to listen to the recording.

Note: recording speed can be adjusted (Between 50% and 150%) using the bar shown below:



Note: volume can be adjusted using the bar shown below:

5. To exit the pop-up window, click the close button, 

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Searching Voicemail & Call Back Request Calls

There are six ways to search for voicemail & call back request calls, as shown below (more than one search feature can be used at the same time):

Number

1. Click the Number input box, type the desired phone number of the call records. An example is shown below:

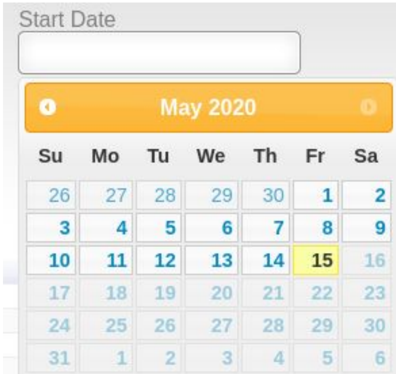
2. Click the search button, .

Status

Denotes the status of the call as “Voicemail.”

Start Date

1. Click the start date input box. The following calendar pop-up window will appear:

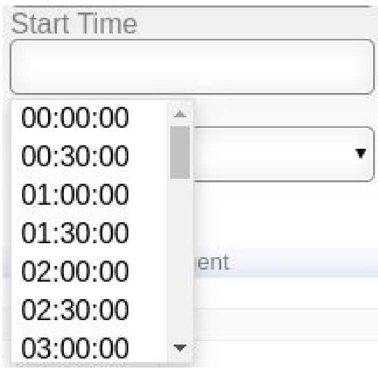


2. Click the desired start date.

3. Click the search button,  .

Start Time

1. Click the start time input box. The following dropdown list will appear:

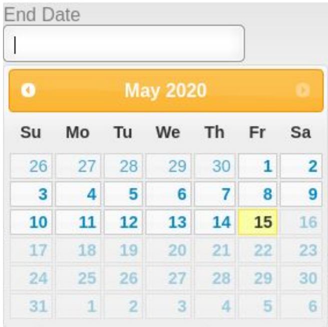


2. Select the desired start time.

3. Click the search button,  .

End Date

1. Click the end date input box, the following calendar pop-up window will appear:

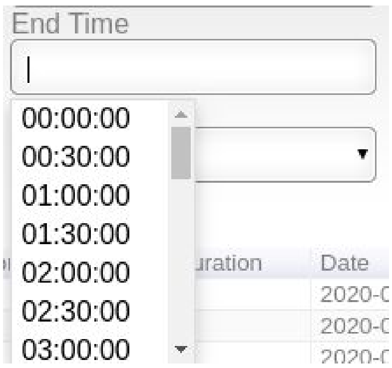


2. Click the desired end date

3. Click the search button,  .

End Time

1. Click the end time input box. The following dropdown list will appear:

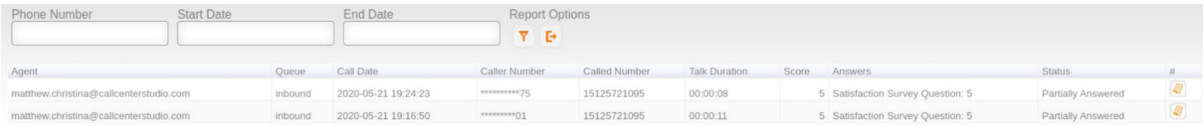


2. Select the desired end time.

3. Click the search button,  .

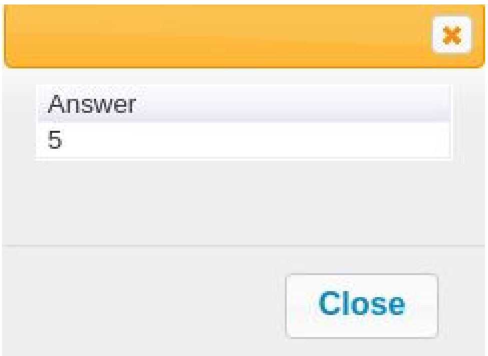
Satisfaction Survey

The Voicemail & Callback Request Screen is shown below:



Viewing Satisfaction Survey Result

1. Click the detail button, , the following pop-up window will appear an example result is shown below:



Filtering Satisfaction Survey

1. To filter the satisfaction surveys, write the preferred phone number or duration of the selection.

2. After all the desired selections have been entered, click the filter button, , to see the filtered list.

Exporting Satisfaction Surveys

1. Filtered satisfaction surveys list can be exported in excel format by clicking on the, , export button.

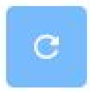
Note: using the records filter, 

, up to a 100 call records can be shown on a single page in the Call Center Studio tenant.

Reporting

The reporting module is where reports about the calls, queues, users, campaigns, etc. of the client can be accessed. Through this module, reports can be filtered, viewed, and exported.

Functions of Keys in Reports:

		
Button used to apply filtering on behalf of the agent, queue name, start and end times in the report.	Both of these buttons are used to export the report in .CSV format.	Button used to refresh the report table.

Types of Reports:

1. Queue
2. Hunt Group
3. Agent
4. Call
5. Chat
6. Campaign
7. Interactive Voice Response
8. Reviews
9. Satisfaction Survey
10. Integrations
11. Platform
12. Beta

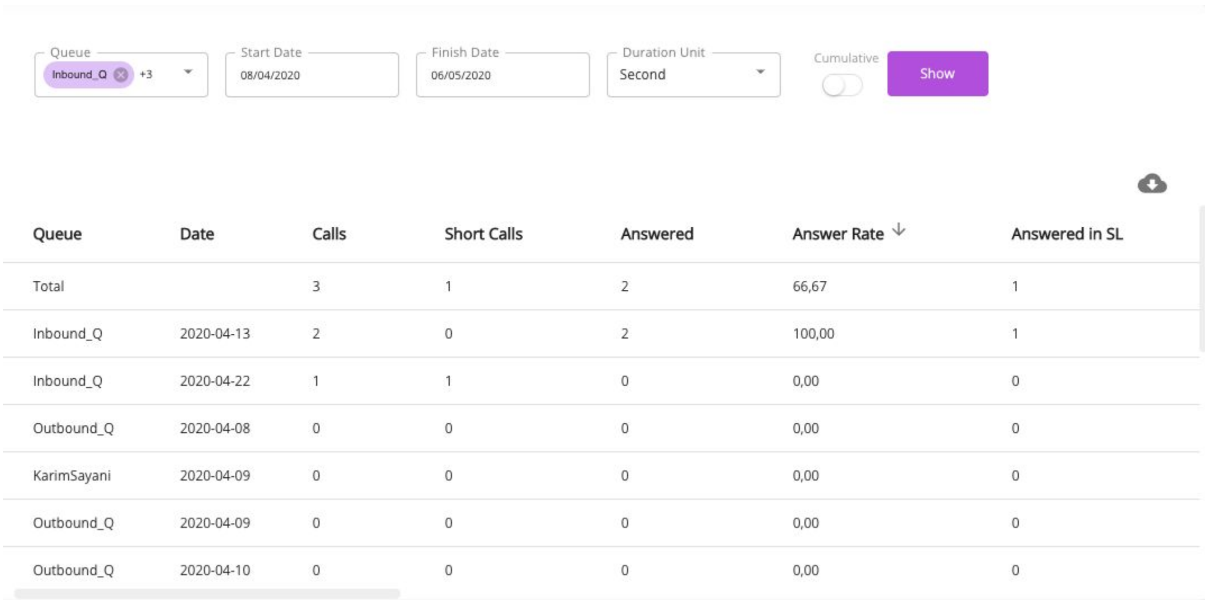
Queue Reports

Under this report title in the manual; Queue Performance Daily, Queue Performance Daily Export, Queue Performance Hourly, and Chat Queue Performance are included.

Queue Performance Daily

Call information about the selected queue on the specified dates is accessed here. If the queue is not selected, a report is received on all queues created on the tenant. Filtered report results can be downloaded in .CSV format.

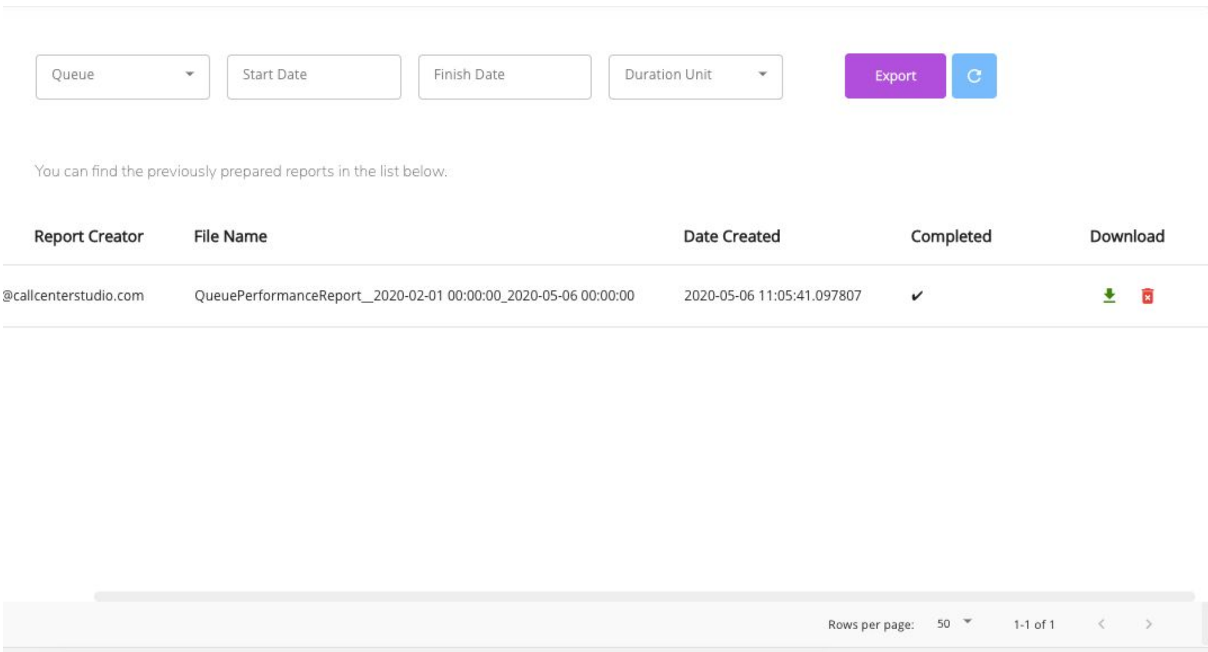
Note: You cannot filter intervals longer than one month!



Queue	Date	Calls	Short Calls	Answered	Answer Rate	Answered in SL
Total		3	1	2	66,67	1
Inbound_Q	2020-04-13	2	0	2	100,00	1
Inbound_Q	2020-04-22	1	1	0	0,00	0
Outbound_Q	2020-04-08	0	0	0	0,00	0
KarimSayani	2020-04-09	0	0	0	0,00	0
Outbound_Q	2020-04-09	0	0	0	0,00	0
Outbound_Q	2020-04-10	0	0	0	0,00	0

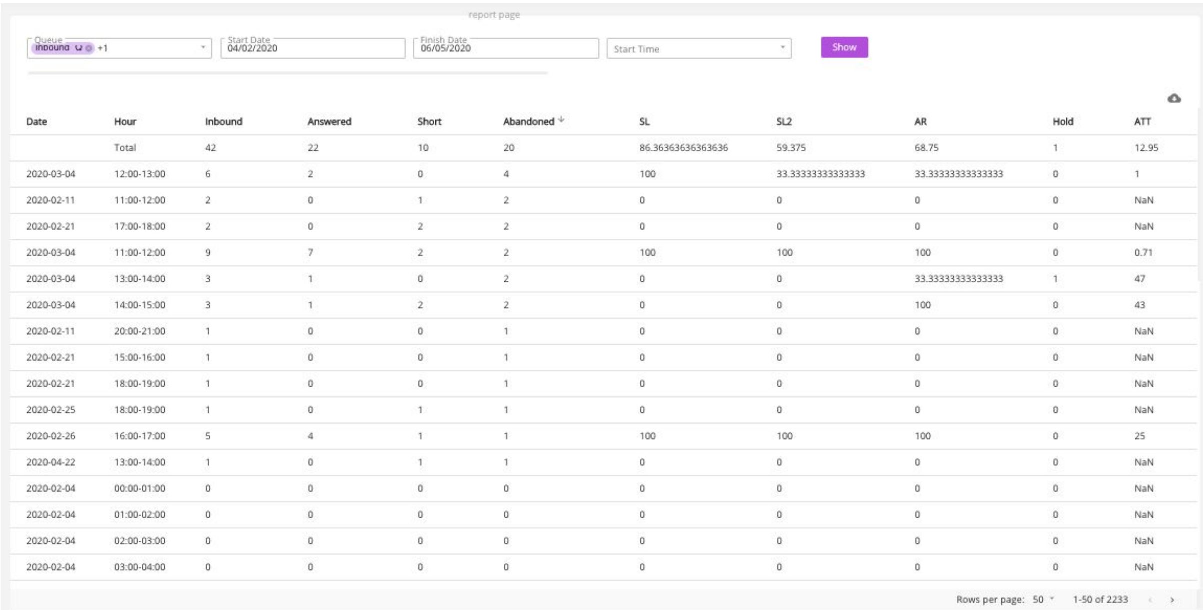
Queue Performance Daily Export

Call information about the selected queue on the specified dates is exported here. Filtered report results can be downloaded in .CSV format by clicking on the download button. Filtered report results can be deleted by clicking on the delete button.



Queue Performance Hourly

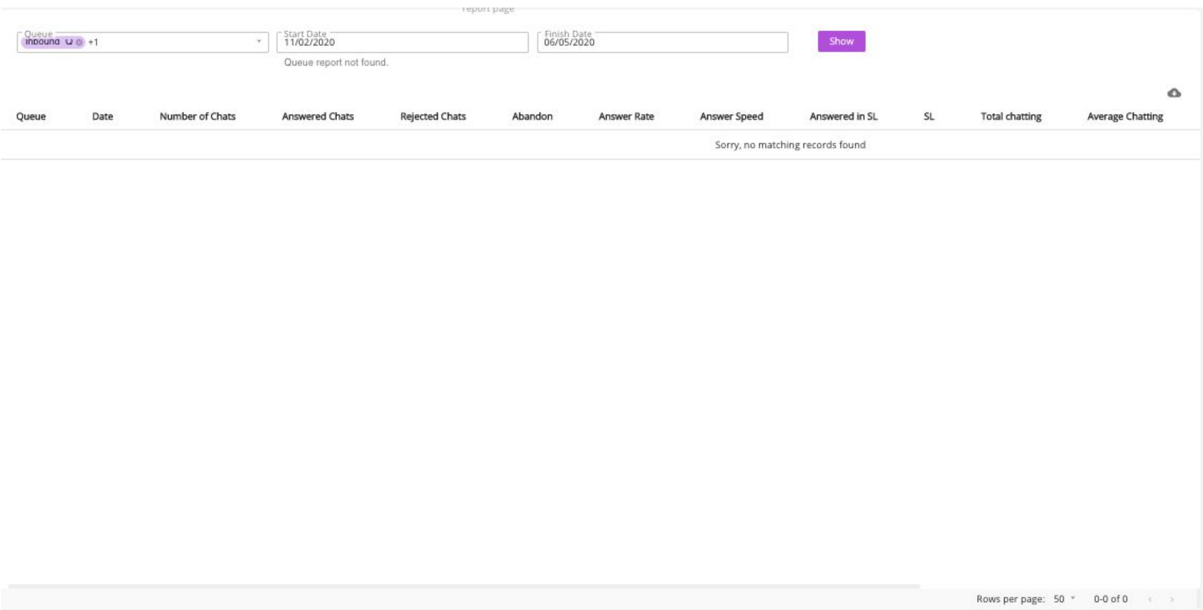
Hourly call information and SL / SL2 / AR percentages related to the selected queue are accessed. Optionally, it can be downloaded in .CSV format.



Date	Hour	Inbound	Answered	Short	Abandoned	SL	SL2	AR	Hold	ATT
	Total	42	22	10	20	86.36363636363636	59.375	68.75	1	12.95
2020-03-04	12:00-13:00	6	2	0	4	100	33.33333333333333	33.33333333333333	0	1
2020-02-11	11:00-12:00	2	0	1	2	0	0	0	0	NaN
2020-02-21	17:00-18:00	2	0	2	2	0	0	0	0	NaN
2020-03-04	11:00-12:00	9	7	2	2	100	100	100	0	0.71
2020-03-04	13:00-14:00	3	1	0	2	0	0	33.33333333333333	1	47
2020-03-04	14:00-15:00	3	1	2	2	0	0	100	0	43
2020-02-11	20:00-21:00	1	0	0	1	0	0	0	0	NaN
2020-02-21	15:00-16:00	1	0	0	1	0	0	0	0	NaN
2020-02-21	18:00-19:00	1	0	0	1	0	0	0	0	NaN
2020-02-25	18:00-19:00	1	0	1	1	0	0	0	0	NaN
2020-02-26	16:00-17:00	5	4	1	1	100	100	100	0	25
2020-04-22	13:00-14:00	1	0	1	1	0	0	0	0	NaN
2020-02-04	00:00-01:00	0	0	0	0	0	0	0	0	NaN
2020-02-04	01:00-02:00	0	0	0	0	0	0	0	0	NaN
2020-02-04	02:00-03:00	0	0	0	0	0	0	0	0	NaN
2020-02-04	03:00-04:00	0	0	0	0	0	0	0	0	NaN

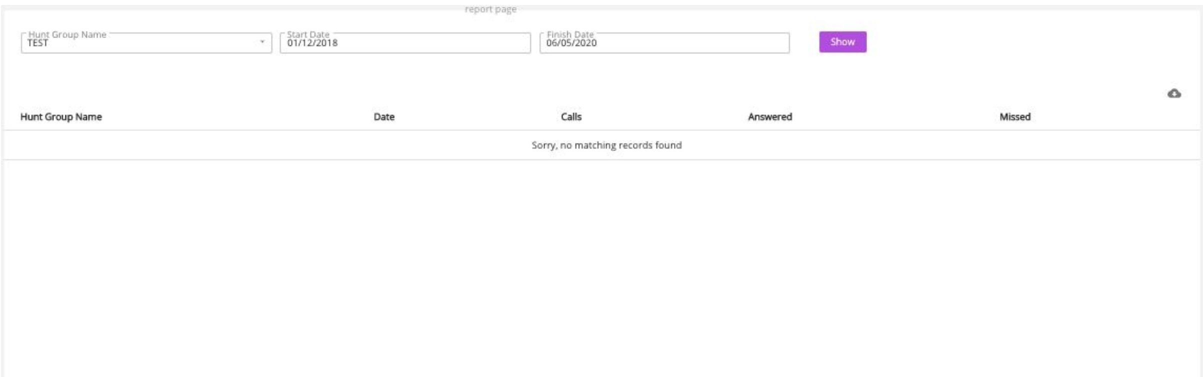
Chat Queue Performance

Chat performance information and answering percentages related to the selected queue are accessed here. It can be downloaded in .CSV format.



Hunt Group Reports

Call results of Ip Phone users included in Hunt groups are accessed. For the Hunt group, the report can be filtered by selecting the start and end time. It can be downloaded in .CSV format.



Agent Reports

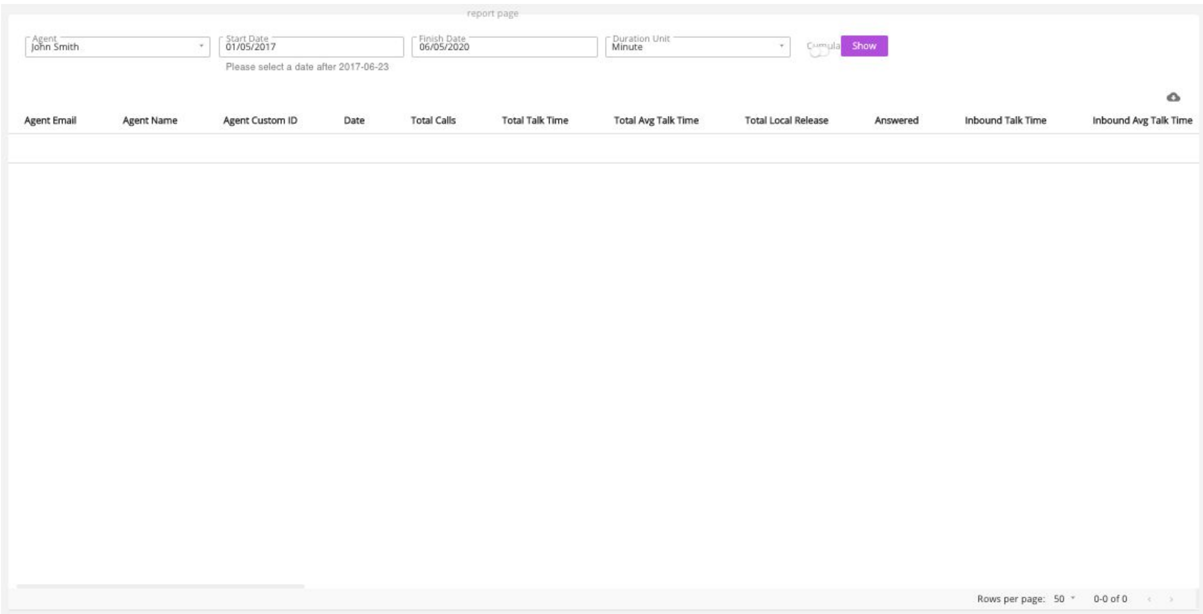
Reports under the title of Agent:

1. Agent Performance Report
2. Agent Performance By Queue
3. Team Performance
4. Agent Status Detail
5. Queue Membership

6. User List

Agent Performance Report

In the Agent Performance report, the performance report of the selected Agent can be accessed. Information such as how many answered calls or outgoing calls can be accessed here. It can be downloaded in .CSV format.



Topics in the Report:

Agent Email	Agent's email
Agent Name	Agent's name
Agent Custom Id	Agent's Custom Id
Date	The date the call arrived
Total Calls	Total number of incoming + outgoing calls
Total Talk Time	Total talking times of incoming + outgoing calls
Total Avg Talk Time	Total incoming + outgoing call average talk times
Total Local Release	Total number of calls terminated by the agent

Answered	Total number of calls answered by the agent
Inbound Talk Time	Total talking time of incoming calls
Inbound Avg Talk Time	Total of average talking times of incoming calls
Inbound Local Release	Sum of incoming calls terminated by the agent
Abandon Calls	Unanswered calls
Outbound Attempts	Total number of failed outgoing calls
Outbound Calls	Total number of outgoing calls
Outbound Talk Time	Total talking time of outgoing calls
Outbound Avg Talk Time	Total average talking times of outgoing calls
Outbound Local Release	Sum of outgoing calls terminated by the agent
Available	Total time that the agent remains in AVAILABLE status
Ringing	Total time that the agent remains in RINGING status
Dialing	Total time that the agent remains in DIALING status
Talking	Total time that the agent remains in TALKING status
Chat	Total time that the agent remains in CHAT status
After Call Work	Total time that the agent remains in ACW status

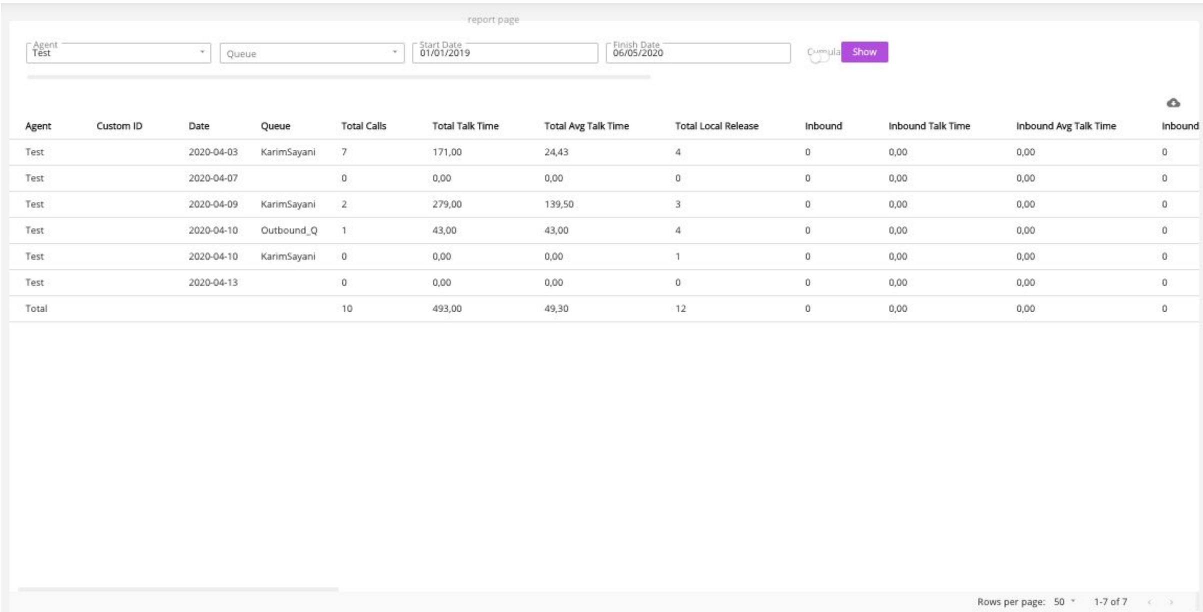
Wrap Up	Total time that the agent remains in WRAP UP status
Break	Total time that the agent remains in BREAK status
Lunch	Total time that the agent remains in LUNCH status
Meeting	Total time that the agent remains in MEETING status
Training	Total time that the agent remains in TRAINING status
Outbound	Total time that the agent remains in OUTBOUND status
Back Office	Total time that the agent remains in BACK OFFICE status
Total Duration	Sum of the time spent in statuses (including custom statuses)
Holds	The number of times the call is put on hold.
Hold Duration	Total time elapsed when the call was put on hold
First Login	Date/time when the agent entered the system for the first time during the day
Last Logout	Date/time when the agent exited the system for the last time during the day
Number of Logout	Total number of times the agent exited from the system during the day
Production	Under the Status tab in the Administator section, when creating a status the “Productive”status can be checked. When checked, the time that the agent was in this status will be displayed here.

Break Lunch	Total time in break + lunch status
Other	Other information if available
Training Meeting	Total time in Training + Meeting statuses
Special Status	Total time in Special status
Answered Speed	The time that the Agent spent answering the call

Agent performance by queue

These are the reports that show the call details and agents' status regarding the queue of incoming and outgoing calls. The report can be filtered according to the agent and the date Also, it can be downloaded in .CSV format.

Note: Descriptions of the fields in the report are the same as the Agent Performance report, only the Agent Special ID field is not added in this report, and the Queue field is added.

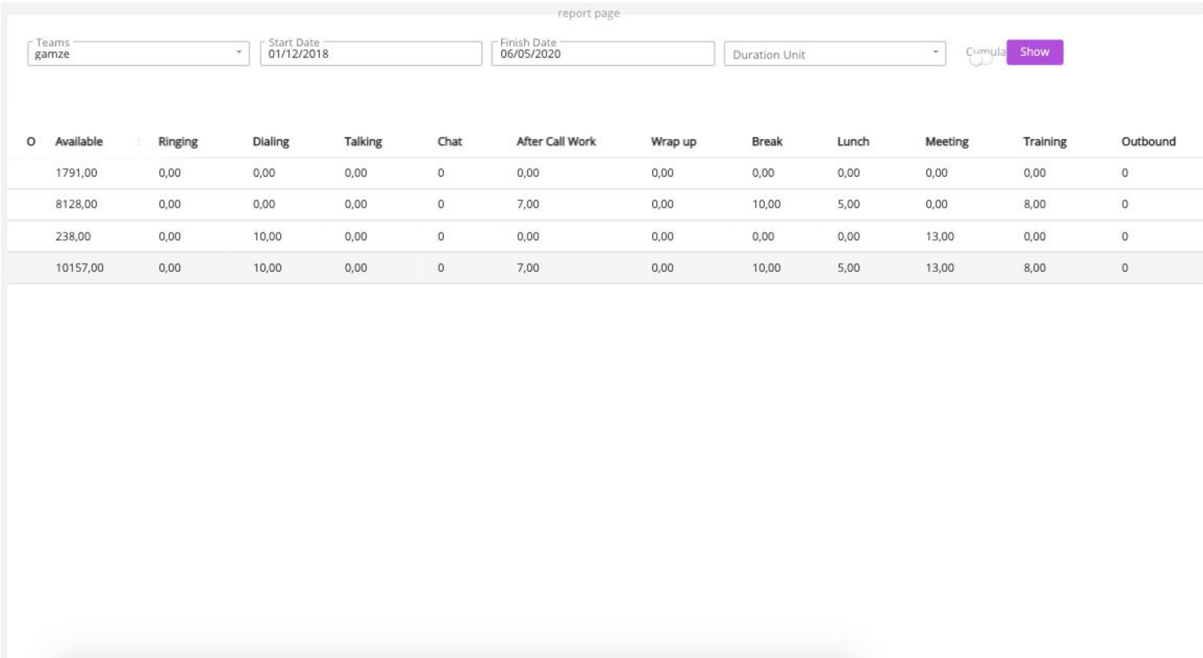


Agent	Custom ID	Date	Queue	Total Calls	Total Talk Time	Total Avg Talk Time	Total Local Release	Inbound	Inbound Talk Time	Inbound Avg Talk Time	Inbound
Test		2020-04-03	KarimSayani	7	171,00	24,43	4	0	0,00	0,00	0
Test		2020-04-07		0	0,00	0,00	0	0	0,00	0,00	0
Test		2020-04-09	KarimSayani	2	279,00	139,50	3	0	0,00	0,00	0
Test		2020-04-10	Outbound_Q	1	43,00	43,00	4	0	0,00	0,00	0
Test		2020-04-10	KarimSayani	0	0,00	0,00	1	0	0,00	0,00	0
Test		2020-04-13		0	0,00	0,00	0	0	0,00	0,00	0
Total				10	493,00	49,30	12	0	0,00	0,00	0

Team Performance Report

Call information of agents in a specific team, and status details of the agents in the team can be accessed. It can be downloaded in .CSV format, which can be filtered by team name and date.

Note: The descriptions of the fields in the report are the same as the Agent Performance report. The only difference is the Team name has been added to the report.

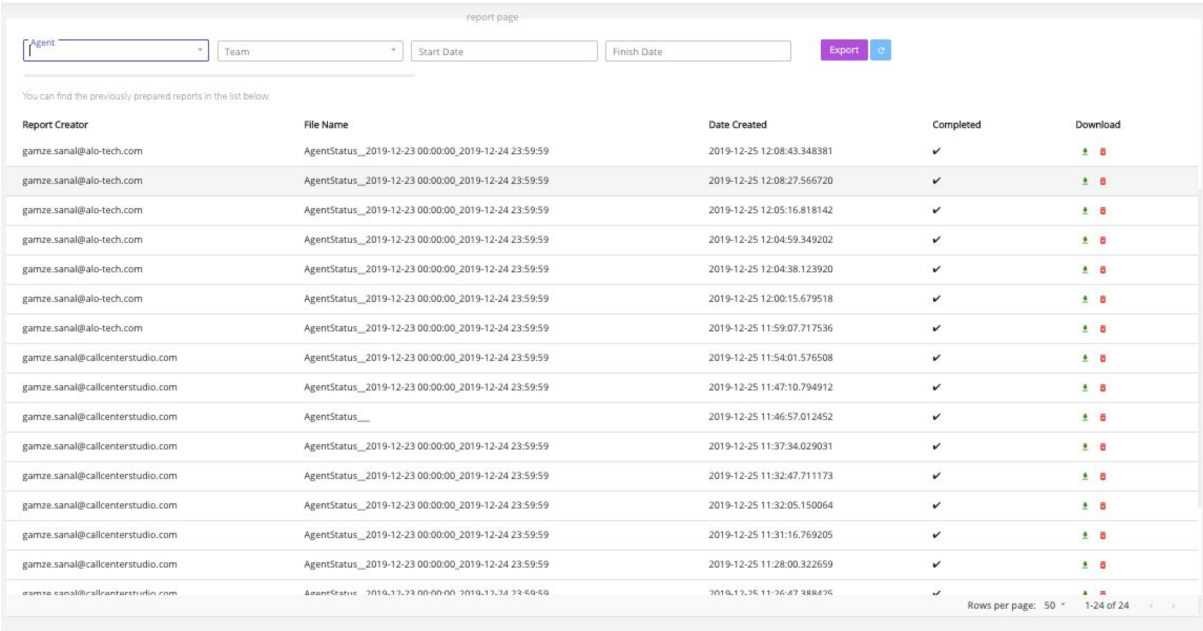

report page

Teams: gamze | Start Date: 01/12/2018 | Finish Date: 06/05/2020 | Duration Unit | Cumula | Show

O	Available	Ringing	Dialing	Talking	Chat	After Call Work	Wrap up	Break	Lunch	Meeting	Training	Outbound
	1791,00	0,00	0,00	0,00	0	0,00	0,00	0,00	0,00	0,00	0,00	0
	8128,00	0,00	0,00	0,00	0	7,00	0,00	10,00	5,00	0,00	8,00	0
	238,00	0,00	10,00	0,00	0	0,00	0,00	0,00	0,00	13,00	0,00	0
	10157,00	0,00	10,00	0,00	0	7,00	0,00	10,00	5,00	13,00	8,00	0

Agent Status Detail

Agent Status Detail reports the status of the agents, the time/date intervals they change their status, and the time they stay in a call status are displayed in detail here. Filtering can be done according to the agent, team, or date. To view the report, it must be downloaded in .CSV format.



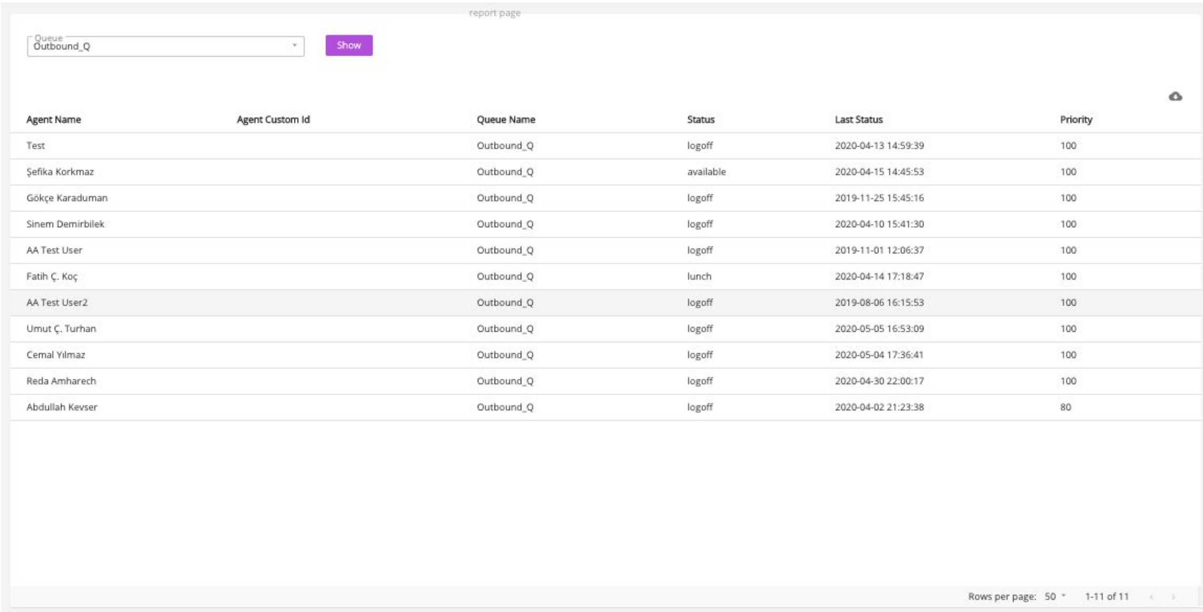
An example of the report is shown below:

Agent	Statues	Date	Duration
John Smith	available	26.11.2015 10:09	3

John Smith	aftercallwork	26.11.2015 10:09	2
John Smith	available	26.11.2015 10:09	25
John Smith	ringing	26.11.2015 10:09	4
John Smith	talking	26.11.2015 10:10	14
John Smith	wrapup	26.11.2015 10:10	6
John Smith	available	26.11.2015 10:10	15
Matt Christina	aftercallwork	26.11.2015 10:10	9
John Smith	available	26.11.2015 10:10	6
John Smith	ringing	26.11.2015 10:11	25
John Smith	talking	26.11.2015 10:11	9
John Smith	available	26.11.2015 10:11	2
John Smith	ringing	26.11.2015 10:11	7

Queue Membership

The included user information in queues, the current status of users, and the priority values of a queue can be seen here. If desired, the report can be downloaded in .CSV format.


report page

Queue: Outbound_Q

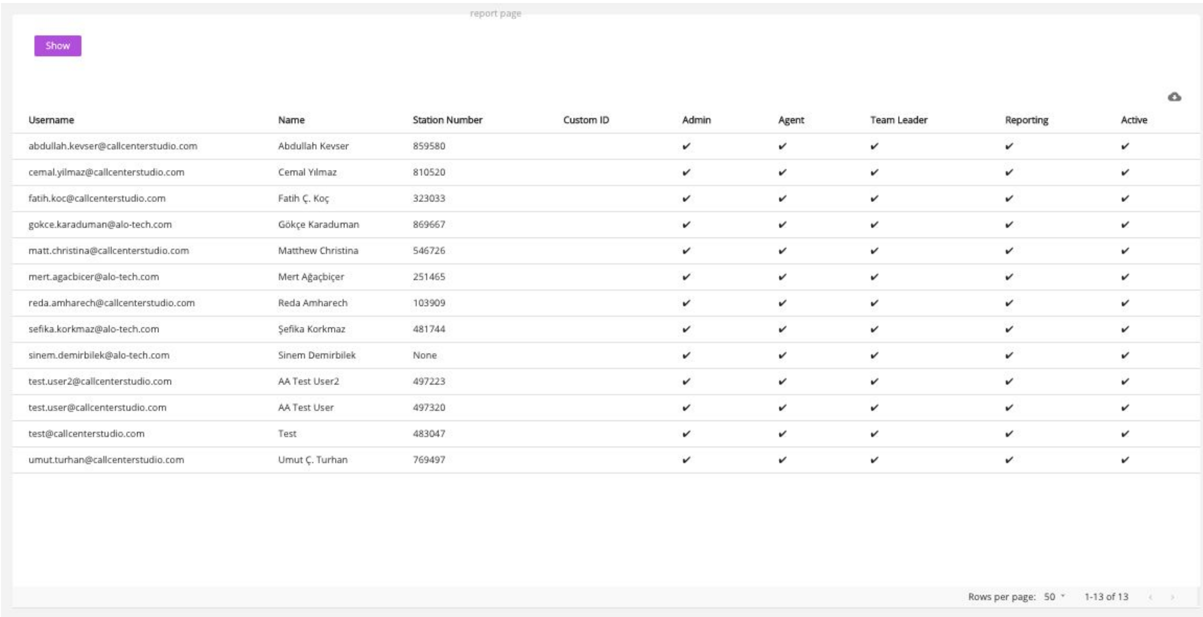
Show

Agent Name	Agent Custom Id	Queue Name	Status	Last Status	Priority
Test		Outbound_Q	logoff	2020-04-13 14:59:39	100
Şefika Korkmaz		Outbound_Q	available	2020-04-15 14:45:53	100
Gökçe Karaduman		Outbound_Q	logoff	2019-11-25 15:45:16	100
Sinem Demirbilek		Outbound_Q	logoff	2020-04-10 15:41:30	100
AA Test User		Outbound_Q	logoff	2019-11-01 12:06:37	100
Fatih Ç. Koç		Outbound_Q	lunch	2020-04-14 17:18:47	100
AA Test User2		Outbound_Q	logoff	2019-08-06 16:15:53	100
Umut Ç. Turhan		Outbound_Q	logoff	2020-05-05 16:53:09	100
Cemal Yılmaz		Outbound_Q	logoff	2020-05-04 17:36:41	100
Reda Amharech		Outbound_Q	logoff	2020-04-30 22:00:17	100
Abdullah Kevser		Outbound_Q	logoff	2020-04-02 21:23:38	80

Rows per page: 50 1-11 of 11

User List

All users registered in the tenant and their authority status are listed. It can be downloaded in .CSV format.


report page

Show

Username	Name	Station Number	Custom ID	Admin	Agent	Team Leader	Reporting	Active
abdullah.kevser@callcenterstudio.com	Abdullah Kevser	859580		✔	✔	✔	✔	✔
cemal.yilmaz@callcenterstudio.com	Cemal Yılmaz	810520		✔	✔	✔	✔	✔
fatih.koc@callcenterstudio.com	Fatih Ç. Koç	323033		✔	✔	✔	✔	✔
gokce.karaduman@alo-tech.com	Gökçe Karaduman	869667		✔	✔	✔	✔	✔
matt.christina@callcenterstudio.com	Matthew Christina	546726		✔	✔	✔	✔	✔
mert.agacbicer@alo-tech.com	Mert Ağaçbiçer	251465		✔	✔	✔	✔	✔
reda.amharech@callcenterstudio.com	Reda Amharech	103909		✔	✔	✔	✔	✔
sefika.korkmaz@alo-tech.com	Şefika Korkmaz	481744		✔	✔	✔	✔	✔
sinem.demirbilek@alo-tech.com	Sinem Demirbilek	None		✔	✔	✔	✔	✔
test.user2@callcenterstudio.com	AA Test User2	497223		✔	✔	✔	✔	✔
test.user@callcenterstudio.com	AA Test User	497320		✔	✔	✔	✔	✔
test@callcenterstudio.com	Test	483047		✔	✔	✔	✔	✔
umut.turhan@callcenterstudio.com	Umut Ç. Turhan	769497		✔	✔	✔	✔	✔

Rows per page: 50 1-13 of 13

Call Reports

Reports under the title of Call:

1. Call Detail
2. Call Transfer
3. General Call Trafic
4. Abandoned Calls from Queues
5. Voicemail & Callback Request Calls

Call Detail Report

1. The report includes detailed information on all calls. Filtering can be done according to queue, Agent name, Start, and End time.

2. If voice recordings are requested to appear in the report, 

option should be selected.

3. It is optional to name the report, and the report can be downloaded in an .CSV format without any name. Filtered report results can be downloaded in .CSV format by clicking on the,  , download button. Filtered report results can be deleted by clicking on the,  , delete button.

Topics in the Report explained in the Manual:

Call ID	The ID of the call
Call Unique ID	Unique ID of the call
Channel	The channel from which the call came and exited
Queued	If the call took place in a queue, “1” will be displayed. If the call did not take place in the queue, “0” will be displayed.
Answered	If the call is answered, “1” will be displayed. If the call was not answered, “0” will be displayed.
Answered By	Agent who answered the call.
Assigned	If the call was assigned to an agent, “1” will be displayed. If the call was not assigned to an agent, “0” will be displayed.
Abandoned	If the call was abandoned, “1” will be displayed. If the call was not abandoned, “0” will be displayed.
Dequeue	-
Call Date	The date and time when the call entered the system.
Queue Date	The date and time when the call was queued.
Connection Date	The date and time when the call was connected to the customer representative.
Hang Up Date	The date and time when the call was closed.
Wait Duration	The wait duration the call
Call Duration	The duration of the call
Hold	The number of times the call was placed on hold
Hold Duration	The length of time that the call was on hold

Service Level	If the call was answered within the service level, “1” will be displayed. If the call was not answered within the service level “0” will be displayed.
Short Call	If the call was closed within the short call duration set time, “1” will be displayed. If the call was not closed within the short call duration set time, “0” will be displayed.
Caller ID	Phone number of the caller
Called Number	The phone number of the person called
Call Direction	The incoming call is called “Inbound,” The outgoing call is specified as “Outbound.”
Queue	Indicates which queue the incoming or outgoing call came or exited from.
Agent	Agent’s name
Agent Custom Id	Agent’s Custom Id
Local Release	If the agent closed the call "1" will be displayed. If the customer closed, the call “0” will be displayed.
Voice Recording	If there is a voice recording for the call, "1" will be displayed. If the voice recording is not logged or if it is not present, "0" will be displayed.
Custom Variables	Call variables defined in the IVR
Source Tenant	Tenant's detailed report of the call
ACD Date	The delivery date of the call
ACD First Queue	Queue where the call was first sent.
Last Attendant Step	The menu step where the call was ended.
Tags	Tags assigned to the call

Transfer Tenant	Tenant sending the call by internal transfer or virtual number
Transfer Tenant Agent	The agent who made the transfer.
Disposition	Automatic result codes are written about the status of the call (Chanunavail, cancel, answer, busy)
IVR Elapsed Time	Total time in IVR

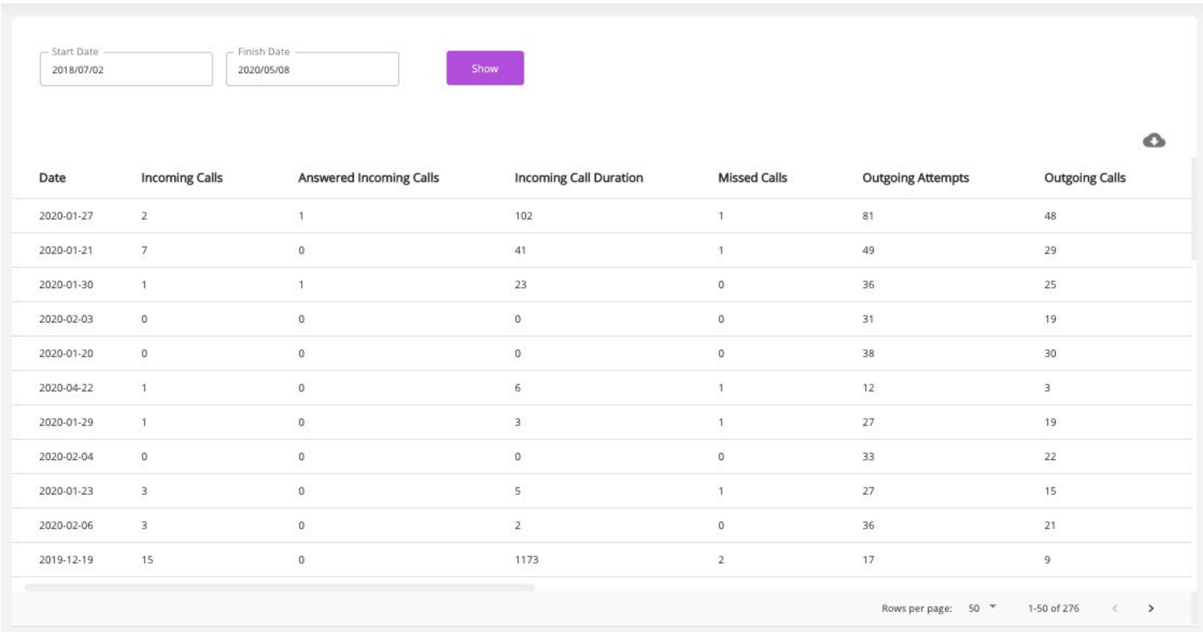
Call Transfer

Information regarding transfers can be found here. It can be filtered using the agent and transfer type. Filtered report results can be downloaded in .CSV format by clicking on the  download button. Filtered report results can be deleted by clicking on the  delete button.

Active Call Key	The key number of the call
Transfer Date	Date of the transferred call
Custom ID	Agent's Custom ID
Transferor	The transferor of the call
Transferee	The transferee of the call
Transfer Type	Type of the Transfer
Initial Queue	The initial call queue
Last Agent	Last agent on the call

General Call Traffic

The information of the Executive Summary Report sent to the users according to the Daily, Weekly, and Monthly options are available via email. (Identification is made from User Notification Settings.)



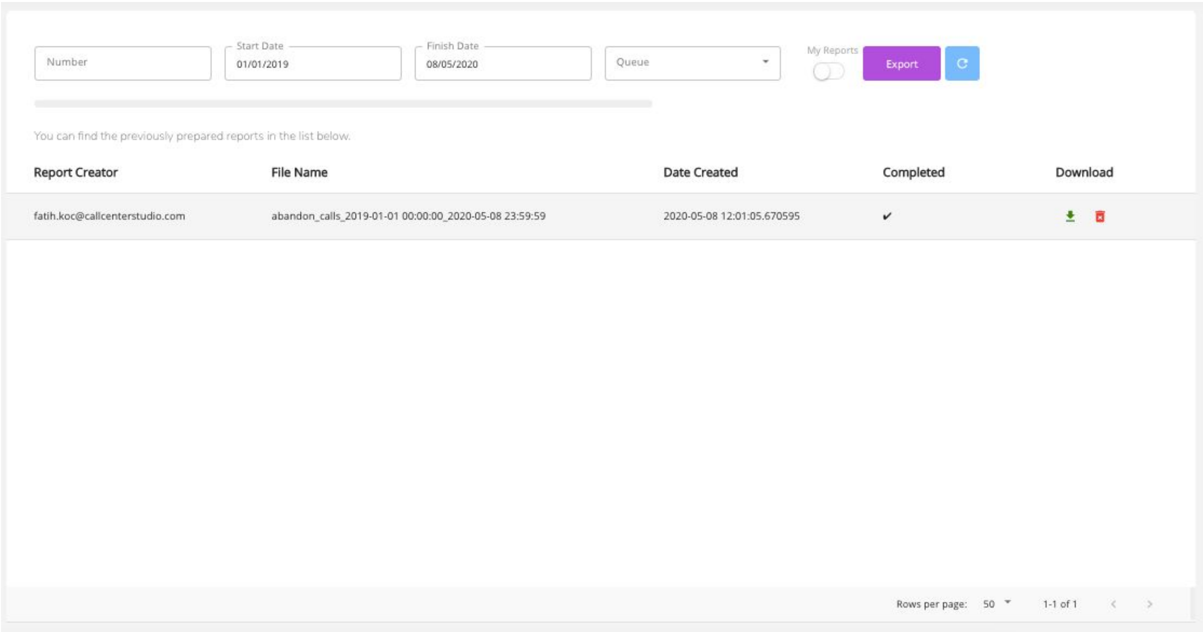
Date	Incoming Calls	Answered Incoming Calls	Incoming Call Duration	Missed Calls	Outgoing Attempts	Outgoing Calls
2020-01-27	2	1	102	1	81	48
2020-01-21	7	0	41	1	49	29
2020-01-30	1	1	23	0	36	25
2020-02-03	0	0	0	0	31	19
2020-01-20	0	0	0	0	38	30
2020-04-22	1	0	6	1	12	3
2020-01-29	1	0	3	1	27	19
2020-02-04	0	0	0	0	33	22
2020-01-23	3	0	5	1	27	15
2020-02-06	3	0	2	0	36	21
2019-12-19	15	0	1173	2	17	9

Rows per page: 50 1-50 of 276

Abandoned Calls from Queues

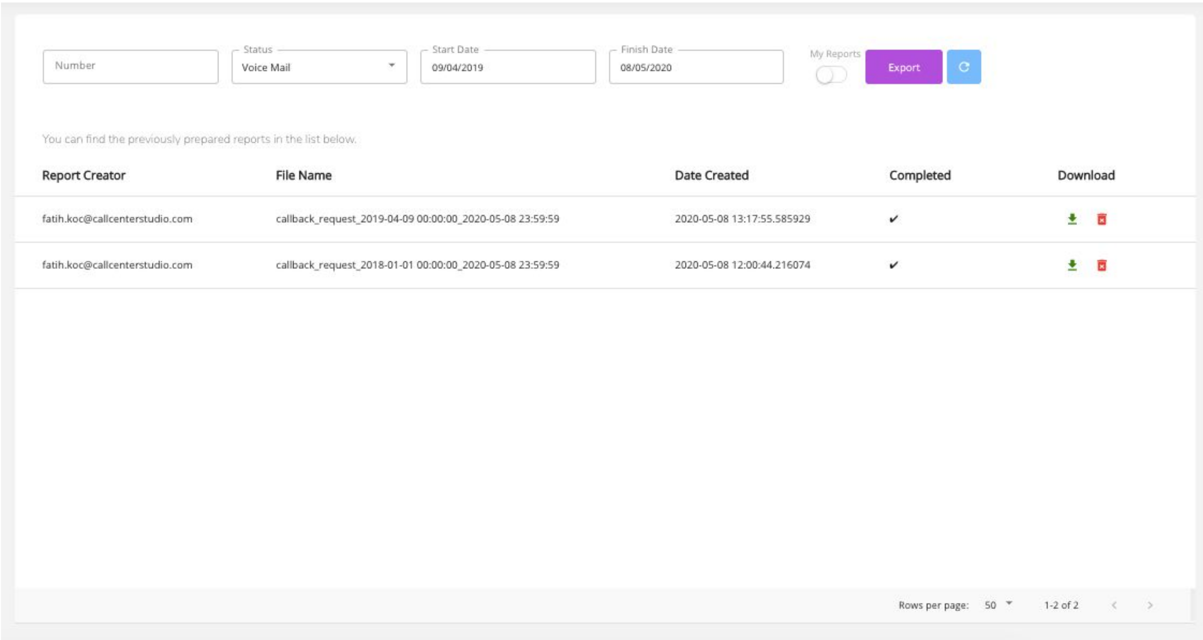
Lists of abandoned calls in queues are displayed in detail here. Filtering can be done by number and queue. To view the report, it must be downloaded in .CSV format. Filtered report results can be downloaded in .CSV format by clicking on the download button.

Filtered report results can be deleted by clicking on the delete button.



Voicemail & Callback Request Calls

Lists the calls that arise from requests of voicemails or callbacks are displayed in detail here. Filtering can be done by number and status. To view the report, it must be downloaded in .CSV format. Filtered report results can be downloaded in .CSV format by clicking on the download button. Filtered report results can be deleted by clicking on the delete button.

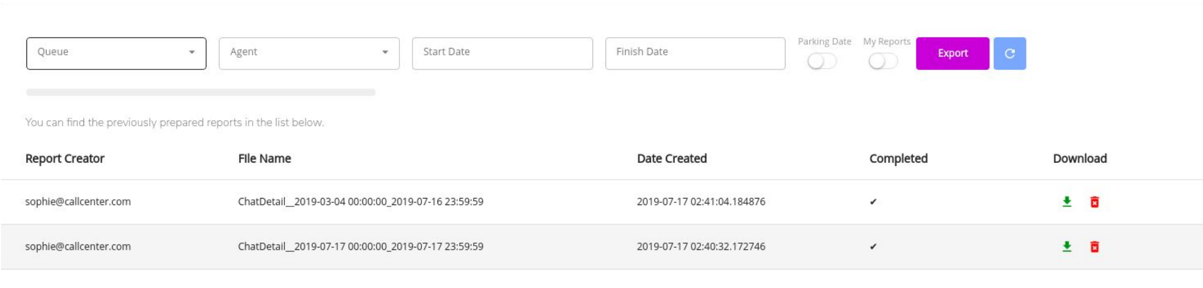


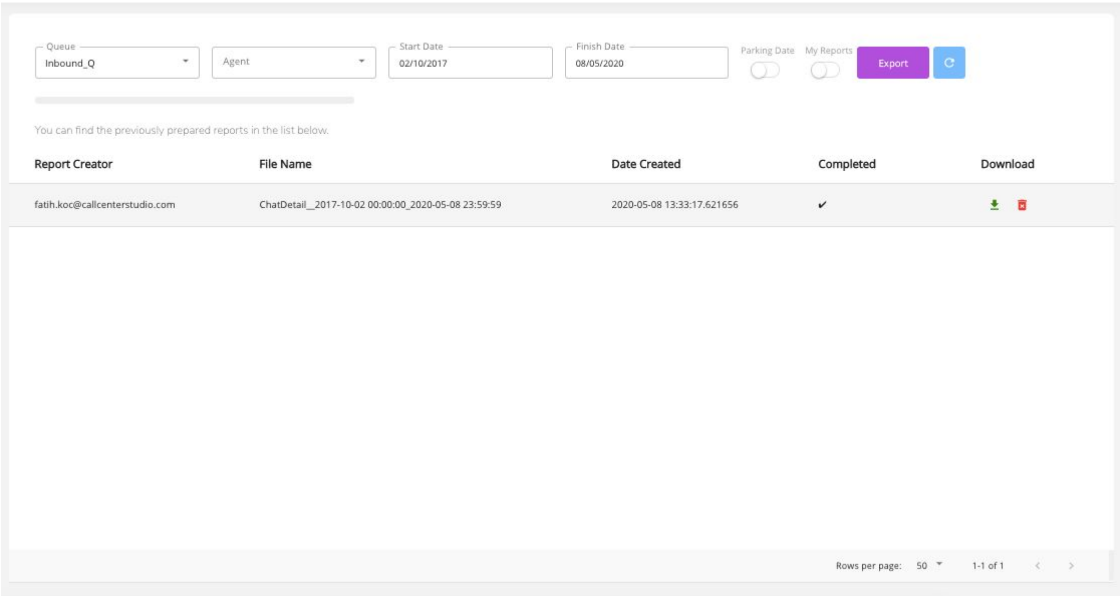
Chat Reports

To view the details, they must be downloaded in .CSV format. Filtered report results can be downloaded in .CSV format by clicking on the download button. Filtered report results can be deleted by clicking on the delete button.

Chat Details Report

Example of the report is shown below:





Campaign Reports

Reports under the title of Campaign:

1. Call History

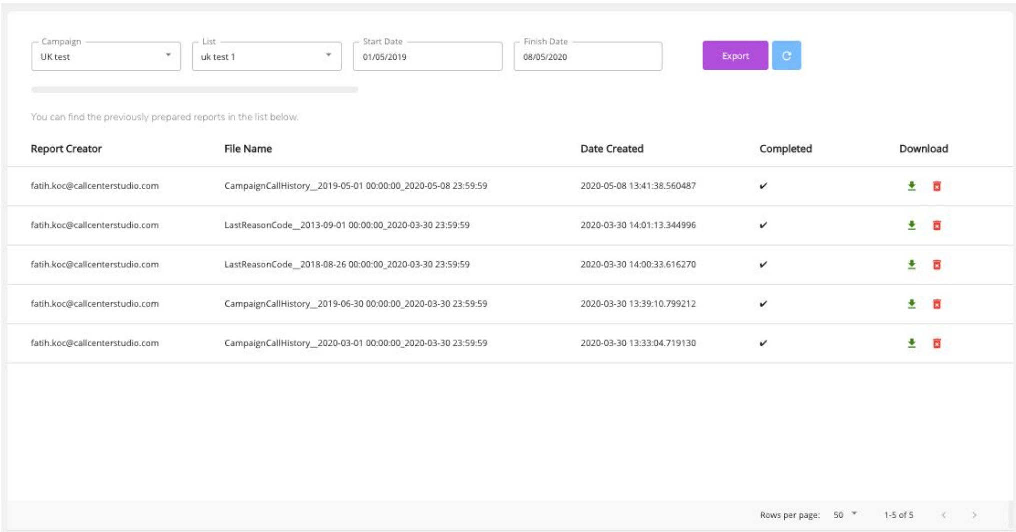
2. Finish Codes

3. Last Finish Code

Call History

Reports show campaign searches, call information, custom fields, notes, planned visit dates (redial date), and scripter results. It can be filtered by the Start-End Date, -loaded list (data), Agent, and campaign name. The report must be downloaded in .CSV format to be displayed.

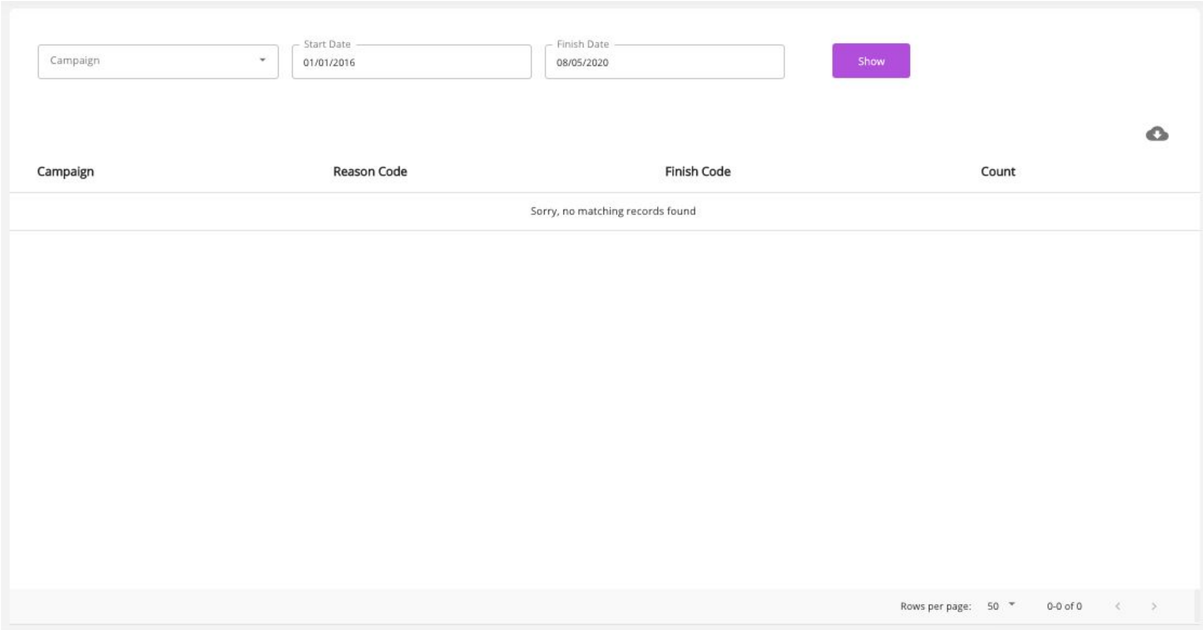
Filtered report results can be downloaded in .CSV format by clicking on the  download button. Filtered report results can be deleted by clicking on the  delete button.



Finish Codes

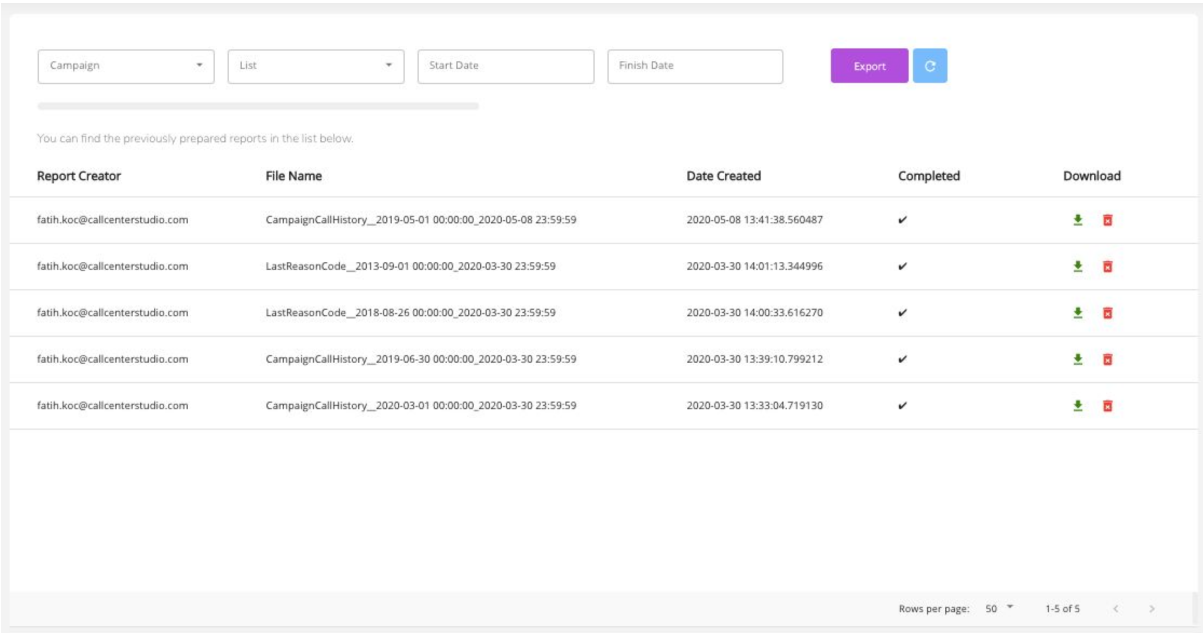
Reports the numbers of the cause-effect codes and result codes of the campaign collectively.

The report can be downloaded in .CSV format.



Last Finish Code

The result code of a number called in the campaign is written in this report. In this report, information such as contact information of the number called, other numbers, and the number of appointments, if the visit was created, can be accessed.

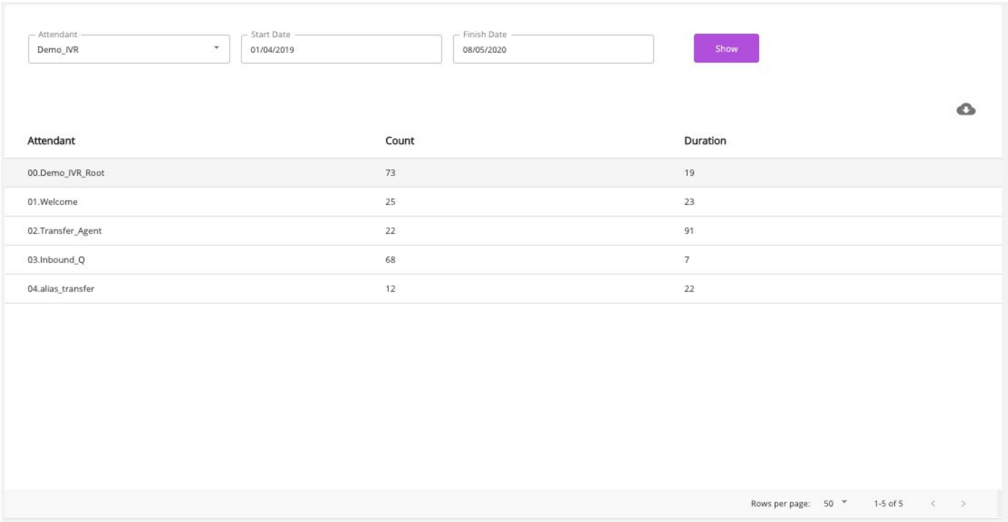


Report Creator	File Name	Date Created	Completed	Download
fatih.koc@callcenterstudio.com	CampaignCallHistory__2019-05-01 00:00:00_2020-05-08 23:59:59	2020-05-08 13:41:38.560487	✔	
fatih.koc@callcenterstudio.com	LastReasonCode__2013-09-01 00:00:00_2020-03-30 23:59:59	2020-03-30 14:01:13.344996	✔	
fatih.koc@callcenterstudio.com	LastReasonCode__2018-08-26 00:00:00_2020-03-30 23:59:59	2020-03-30 14:00:33.616270	✔	
fatih.koc@callcenterstudio.com	CampaignCallHistory__2019-06-30 00:00:00_2020-03-30 23:59:59	2020-03-30 13:39:10.799212	✔	
fatih.koc@callcenterstudio.com	CampaignCallHistory__2020-03-01 00:00:00_2020-03-30 23:59:59	2020-03-30 13:33:04.719130	✔	

Interactive Voice Response Reports

Routing Performance

The Routing Performances in the Welcome menu can be accessed here. These are the reports that have the "Log" option selected when creating IVR steps. It is also the reports of how often IVR steps are taken between the chosen dates and the total waiting times in the steps.



Review

Reports under the title of Review:

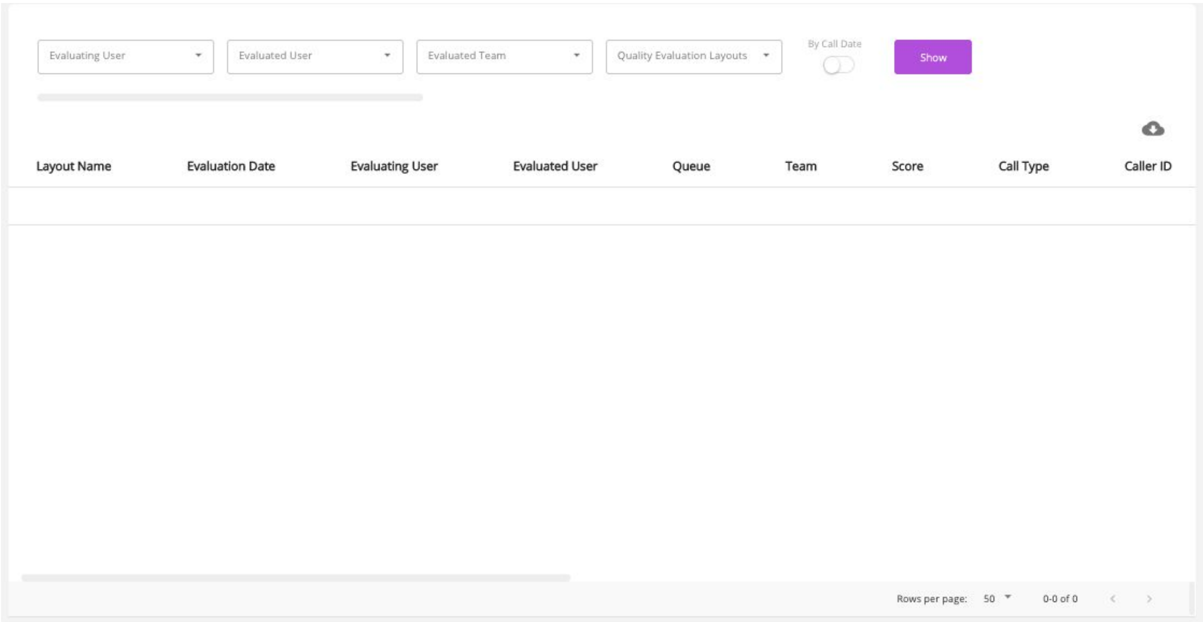
1. Evaluation Summary

2. Evaluation Summary Export

3. Evaluation Detail Export

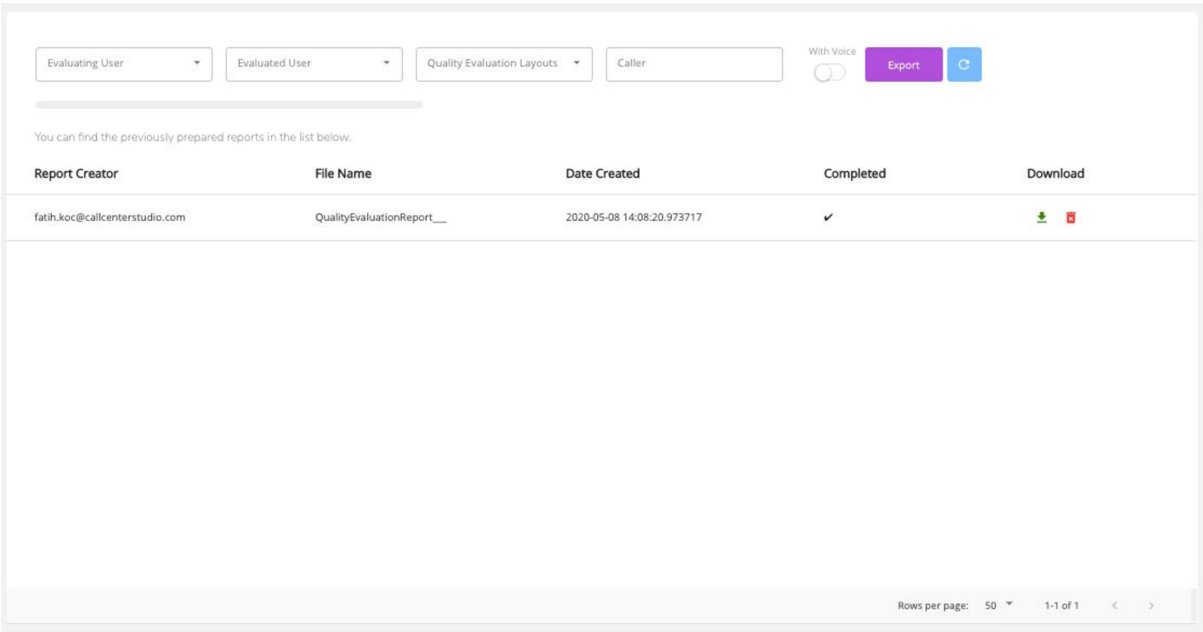
Evaluation Summary

Agents' calls are evaluated using quality evaluation forms. Evaluation results can be found in this report. It can be filtered by agents, team leaders, and dates. It can be downloaded in .CSV format.



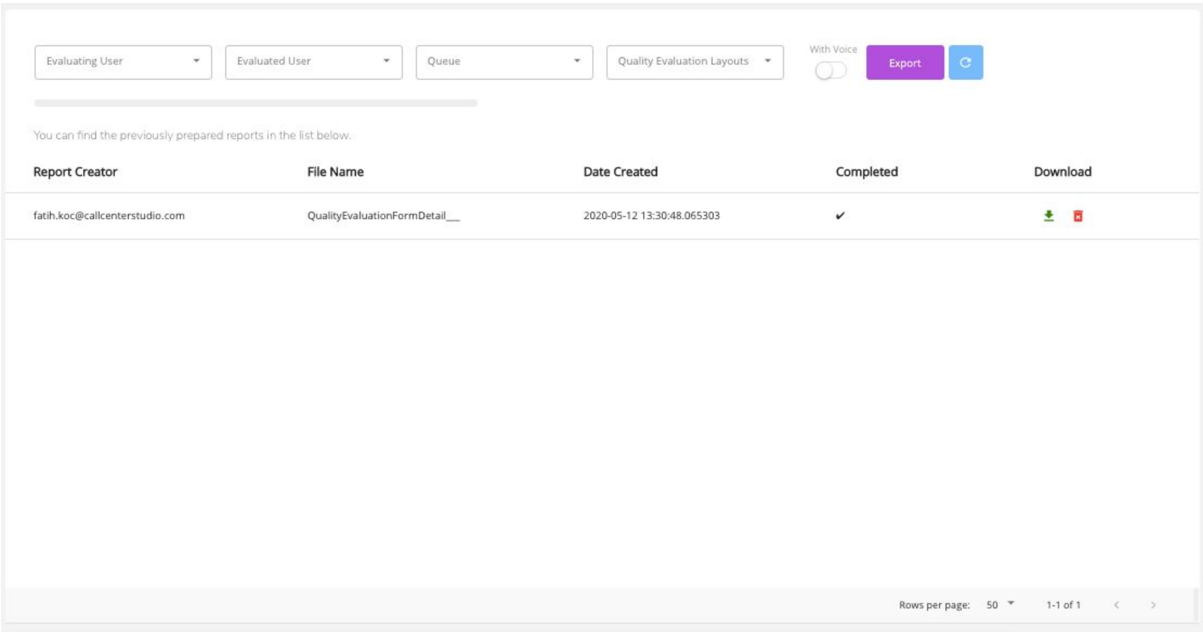
Evaluation Summary Export

Evaluation Summary is exported here. Filtered report results can be downloaded in .CSV format by clicking on the download button. Filtered report results can be deleted by clicking on the delete button.



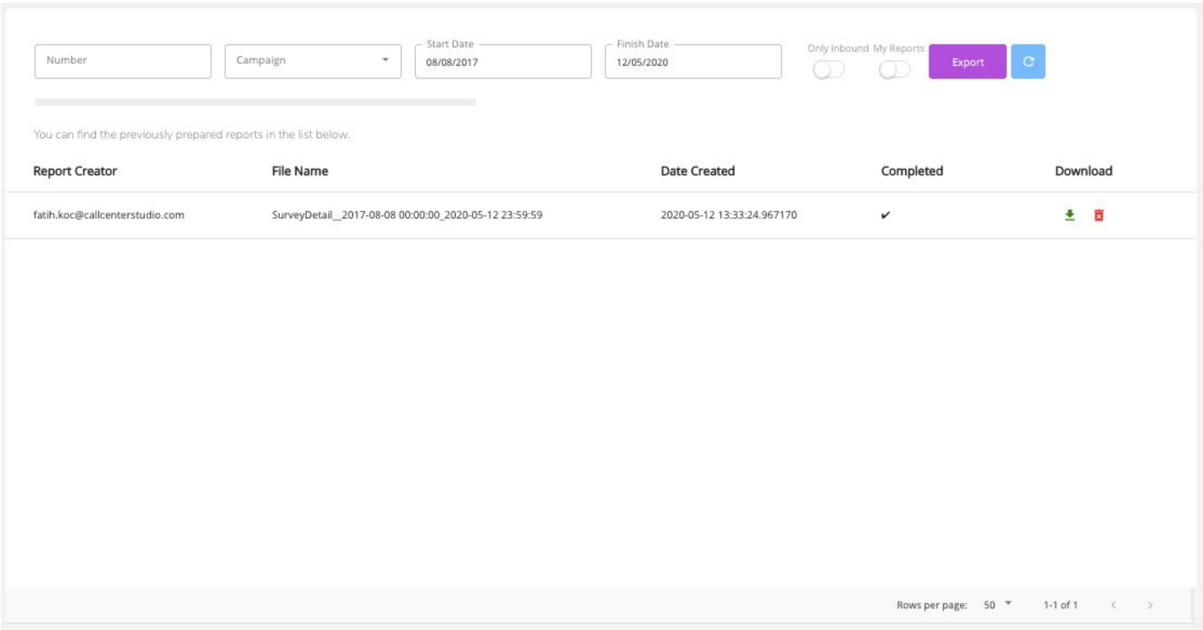
Evaluation Detail Export

Lists of evaluations are displayed in detail here. To view the report, it must be downloaded in .CSV format. Filtered report results can be downloaded in .CSV format by clicking on the  download button. Filtered report results can be deleted by clicking on the  delete button.



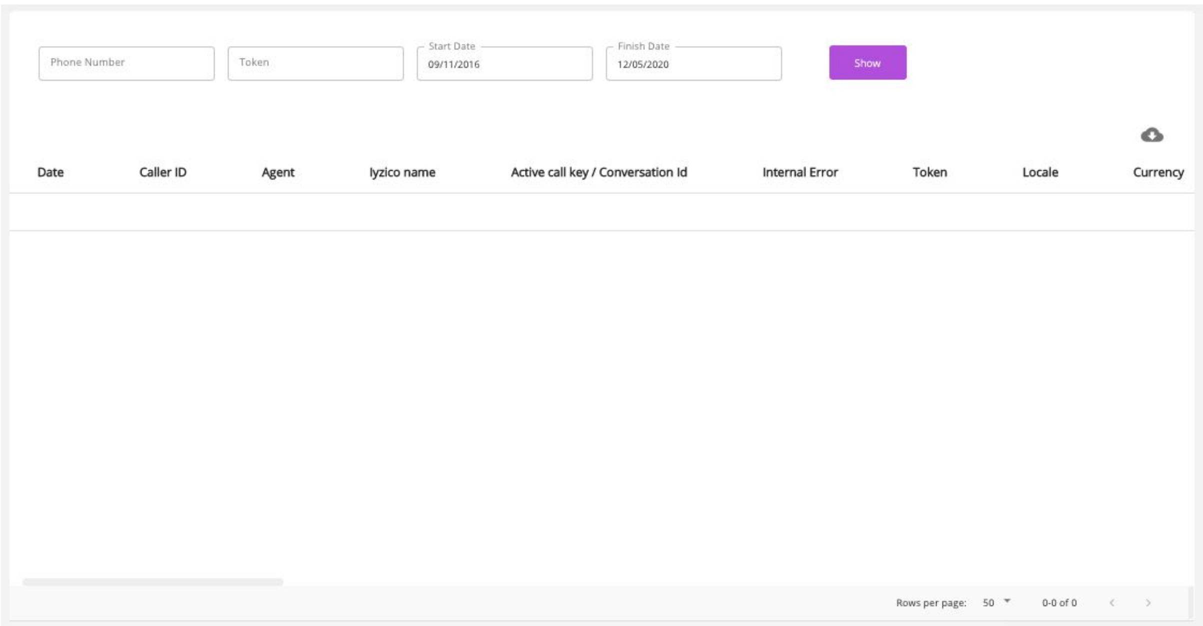
Satisfaction Survey Reports

These are the reports that reach the keying values made by the customers, in response to the satisfaction survey questions defined in the IVR. Reports can be filtered according to start/finish date, phone number, campaign, being inbound or not, and downloaded in .CSV format.



Integrations

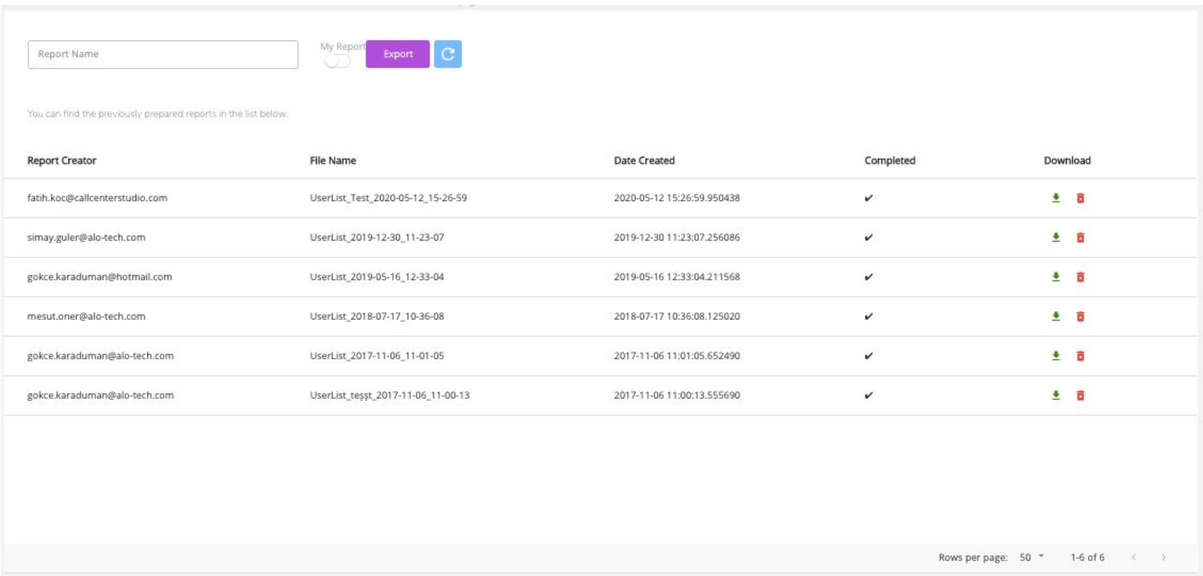
In this section, there are headings in which connections of different services that the system is integrated can be used. Regarding these integrations, the guidance of the assigned Call Center Studio project manager should be consulted regarding the installation and use.



Platform

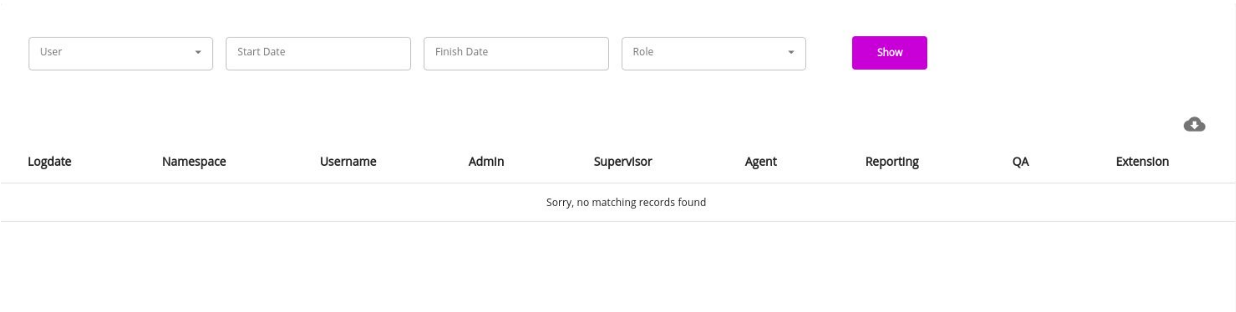
All users

All users registered in Tenant regarding related reports are listed here. It can be downloaded in .CSV format.



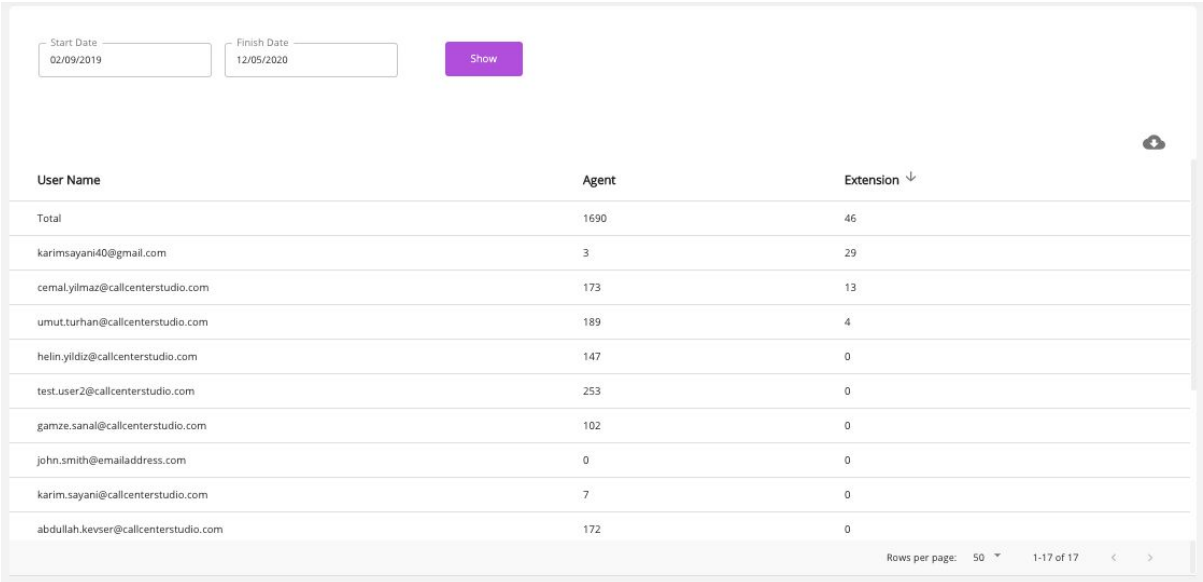
Daily User Status

All users who become active on the specified dates are accessed here. It is possible to filter the results based on the type of roles of users. Filtered report results can be downloaded in .CSV format optionally.



Billing Summary

All users' billing summaries on the specified dates are shown here. It can also be downloaded in .CSV format optionally.



Start Date 02/09/2019 | Finish Date 12/05/2020 | Show

User Name	Agent	Extension
Total	1690	46
karimsayani40@gmail.com	3	29
cemal.yilmaz@callcenterstudio.com	173	13
umut.turhan@callcenterstudio.com	189	4
helin.yildiz@callcenterstudio.com	147	0
test.user2@callcenterstudio.com	253	0
gamze.sanal@callcenterstudio.com	102	0
john.smith@emailaddress.com	0	0
karim.sayani@callcenterstudio.com	7	0
abdullah.kevser@callcenterstudio.com	172	0

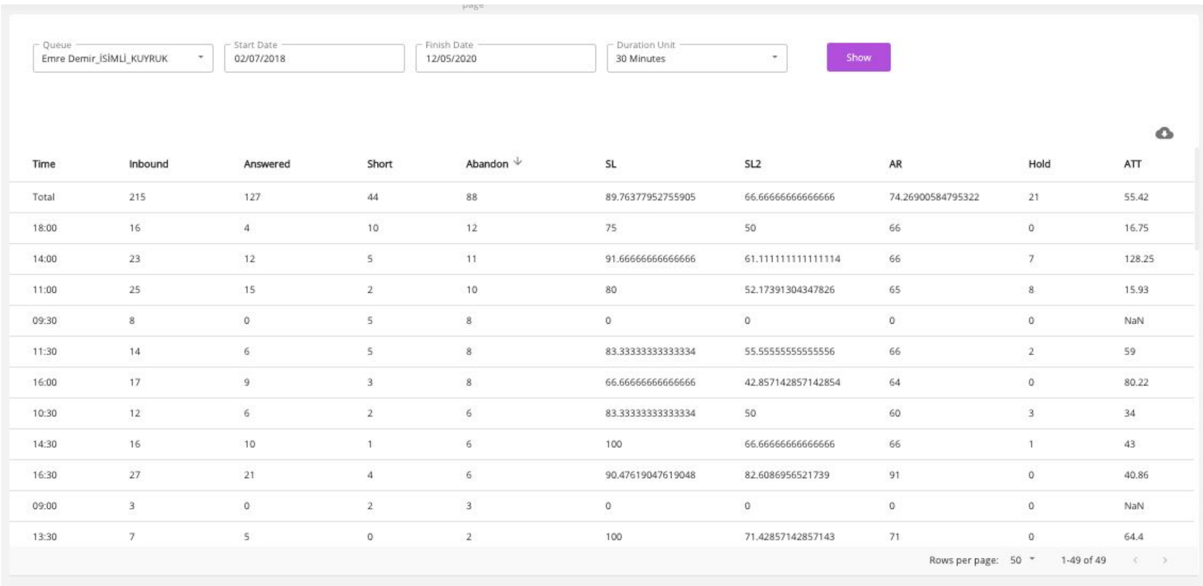
Rows per page: 50 | 1-17 of 17

Beta

Sections that are actively being edited appear here. For example, if a new user is being created it will appear here. This section is used normally by the Call Center Studio Development Team or Assigned Project Manager.

Queue Performance

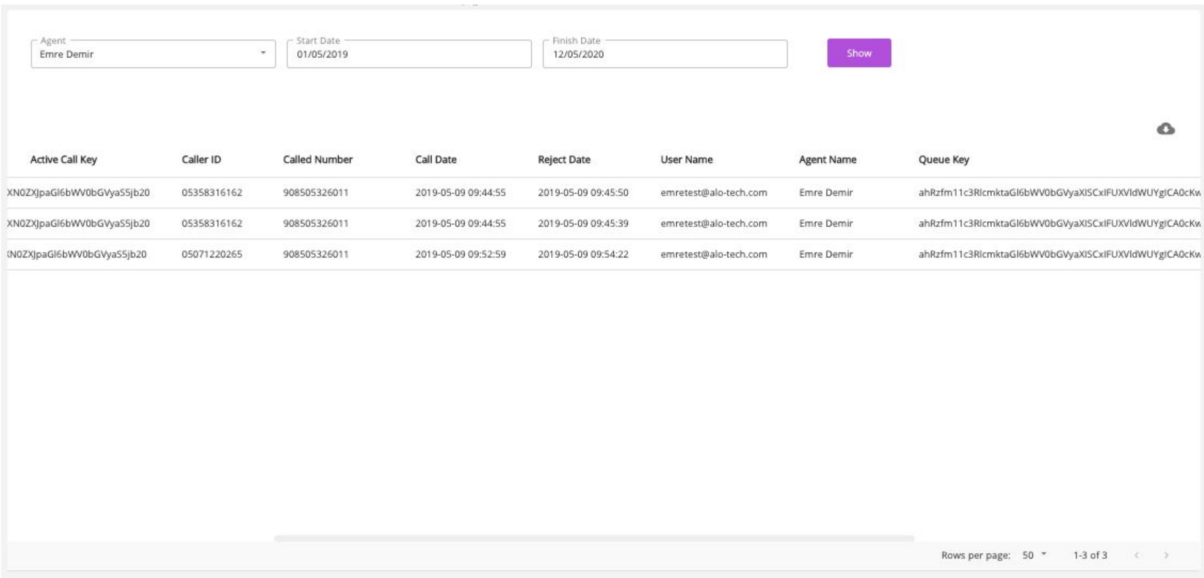
Beta versions of the reports regarding queue's performances, which are not completed yet, can be seen here. It can be filtered by duration as 15 minutes, 30 minutes, and hourly. It can also be downloaded in .CSV format optionally.



Time	Inbound	Answered	Short	Abandon	SL	SL2	AR	Hold	ATT
Total	215	127	44	88	89.76377952755905	66.66666666666666	74.26900584795322	21	55.42
18:00	16	4	10	12	75	50	66	0	16.75
14:00	23	12	5	11	91.66666666666666	61.111111111111114	66	7	128.25
11:00	25	15	2	10	80	52.17391304347826	65	8	15.93
09:30	8	0	5	8	0	0	0	0	NaN
11:30	14	6	5	8	83.33333333333334	55.55555555555556	66	2	59
16:00	17	9	3	8	66.66666666666666	42.857142857142854	64	0	80.22
10:30	12	6	2	6	83.33333333333334	50	60	3	34
14:30	16	10	1	6	100	66.66666666666666	66	1	43
16:30	27	21	4	6	90.47619047619048	82.6086956521739	91	0	40.86
09:00	3	0	2	3	0	0	0	0	NaN
13:30	7	5	0	2	100	71.42857142857143	71	0	64.4

<u>Rejected Calls on Queue</u>

Beta versions of the reports regarding rejected calls on queues that are not completed can be seen here. It can be filtered by duration as 15 minutes, 30 minutes, and hourly. It can also be downloaded in .CSV format optionally.


Agent
Emre Demir
Start Date
01/05/2019
Finish Date
12/05/2020
Show
Active Call Key
Caller ID
Called Number
Call Date
Reject Date
User Name
Agent Name
Queue Key
XN0ZXJpaGl6bWV0bGVyaS5jb20 05358316162 908505326011 2019-05-09 09:44:55 2019-05-09 09:45:50 emretest@alo-tech.com Emre Demir ahRzfm11c3RlcmktaGl6bWV0bGVyaXISCxIFUXVldWUYgICA0cKw
XN0ZXJpaGl6bWV0bGVyaS5jb20 05358316162 908505326011 2019-05-09 09:44:55 2019-05-09 09:45:39 emretest@alo-tech.com Emre Demir ahRzfm11c3RlcmktaGl6bWV0bGVyaXISCxIFUXVldWUYgICA0cKw
N0ZXJpaGl6bWV0bGVyaS5jb20 05071220265 908505326011 2019-05-09 09:52:59 2019-05-09 09:54:22 emretest@alo-tech.com Emre Demir ahRzfm11c3RlcmktaGl6bWV0bGVyaXISCxIFUXVldWUYgICA0cKw
Rows per page: 50
1-3 of 3

Supervisor

The supervisor screen provides the necessary tools to manage the entire operation.

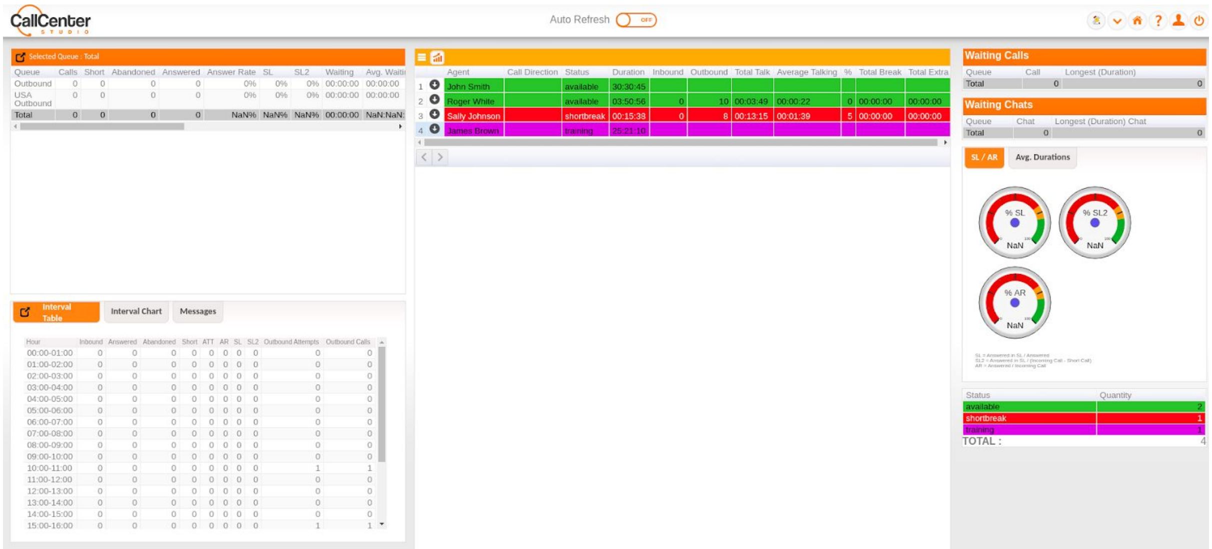
Automatic Refresh

The automatic refresh button is located on the top of the supervisor screen. When Auto Refresh is “On” updates will be refreshed in real-time.

Auto Refresh can be turned off by clicking the refresh button. As shown below:

Agent Default Screen

The agent default screen is the first screen that appears when the Supervisor tab is clicked from this screen; multiple contact center matrixes are provided.



Queue Performance Table

Located in the top left-hand corner of the supervisor default screen is the Queue Performance table, as shown below:

Selected Queue : Total

Queue	Calls	Short	Abandoned	Answered	Answer Rate	SL	SL2	Waiting	Avg. Waiting
inbound	9	5	0	4	44%	100%	100%	00:00:16	00:00:04
Total	9	5	0	4	44%	100%	100%	00:00:16	00:00:01

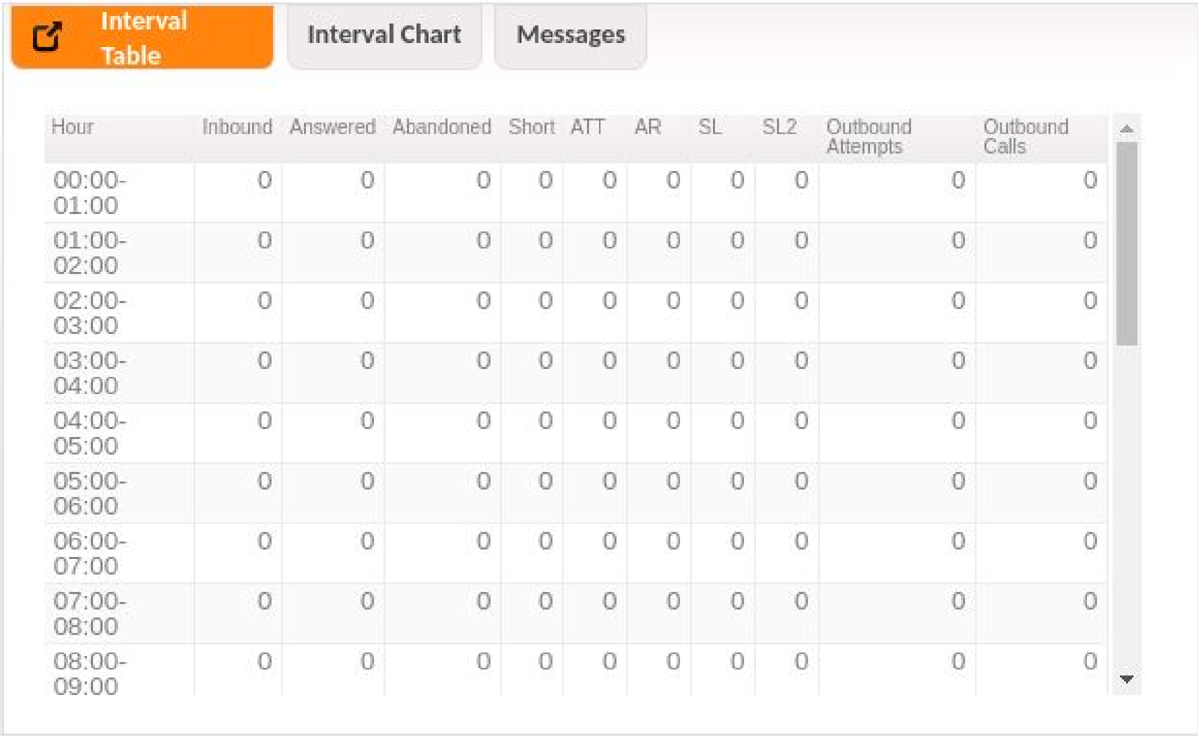
This table provides queue metrics based on individual queues. Multiple queues can be compared at a glance, and decisions can be made based on the information provided. Number of calls, number of short calls, number of abandoned calls, number of answer calls, the answer rate, service level, waiting time and average waiting time, outbound attempts, talk times, and chat details are provided.

Also, when the expand button, , is clicked. The table above will appear in a pop-up window format, as shown below:

Queue	Calls	Short	Abandoned	Answered	Answer Rate	SL	SL2	Waiting	Avg. Waiting	Talk	Avg. Talk	Release	Ou
outbound	0	0	0	0	0%	0%	0%	00:00:00	00:00:00	00:00:00	00:00:00	0	
inbound	6	0	1	5	83%	60%	50%	00:02:09	00:00:21	00:08:29	00:01:41	0	
Total	6	0	1	5	83%	60%	50%	00:02:09	00:00:21	00:08:29	00:01:41	0	

Interval Table

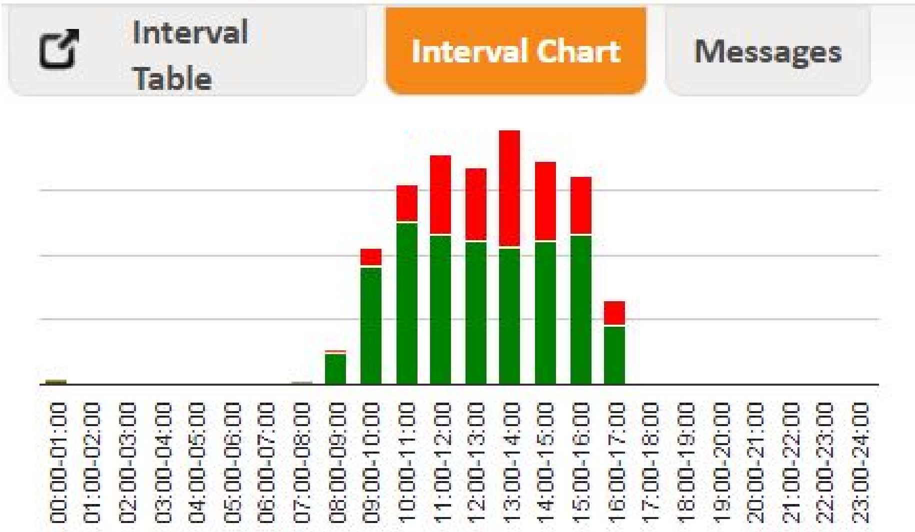
Information such as calls per hour, answered calls, and service level can be viewed here. It is possible to view total values and hourly values by selecting individual hour lines.



Hour	Inbound	Answered	Abandoned	Short	ATT	AR	SL	SL2	Outbound Attempts	Outbound Calls
00:00-01:00	0	0	0	0	0	0	0	0	0	0
01:00-02:00	0	0	0	0	0	0	0	0	0	0
02:00-03:00	0	0	0	0	0	0	0	0	0	0
03:00-04:00	0	0	0	0	0	0	0	0	0	0
04:00-05:00	0	0	0	0	0	0	0	0	0	0
05:00-06:00	0	0	0	0	0	0	0	0	0	0
06:00-07:00	0	0	0	0	0	0	0	0	0	0
07:00-08:00	0	0	0	0	0	0	0	0	0	0
08:00-09:00	0	0	0	0	0	0	0	0	0	0

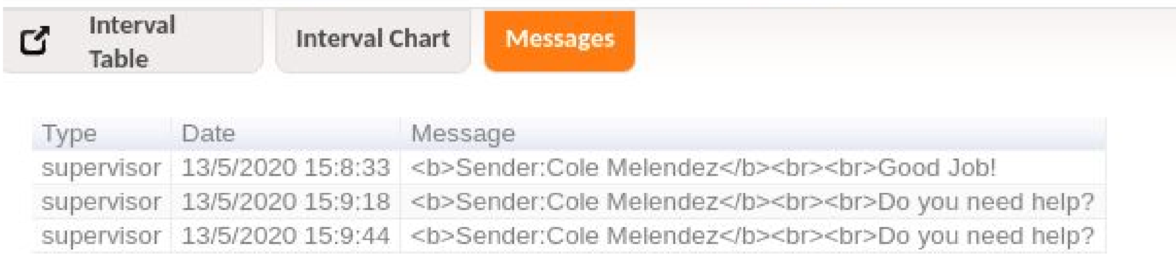
Interval Chart

Inbound calls are expressed with graphics. Green columns indicate answered calls, and red columns show missed calls.



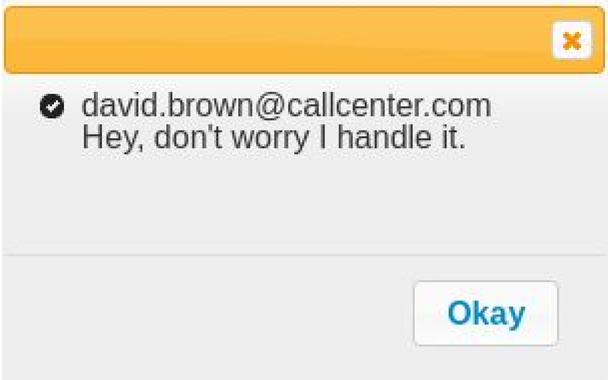
Messages

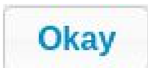
Previous messages from agents assigned to the supervisor can be viewed here.



Type	Date	Message
supervisor	13/5/2020 15:8:33	Sender:Cole Melendez Good Job!
supervisor	13/5/2020 15:9:18	Sender:Cole Melendez Do you need help?
supervisor	13/5/2020 15:9:44	Sender:Cole Melendez Do you need help?

Incoming messages from an agent will pop-up in the middle of the supervisor screen, as shown below:



Click the Okay button, 

, to return to the supervisor screen.

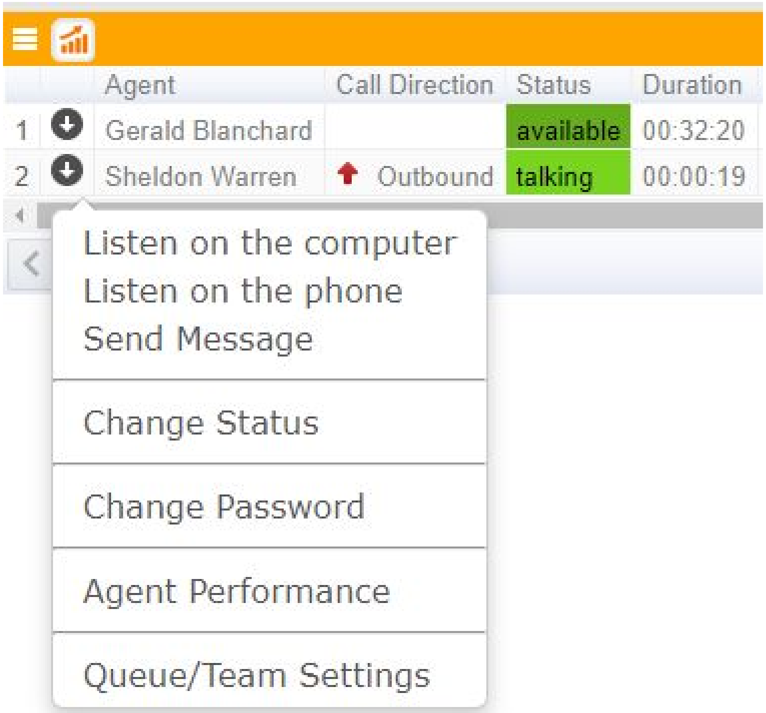
Agent Status List

The agent status list provides a quick overview of the agent's performance. Details such as length of status duration, inbound, and outbound call totals are provided here. Also, using this list, agents can be messaged, their status can be changed along with their password, individual performance can be viewed, and queue or team modifications for each agent can be made.

	Agent	Call Direction	Status	Duration	Inbound	Outbound	Total Talk	Average Talking	%	Total Break	Total Ex
1	Keyon Sweeney		chatting (1)	00:00:12	0	0	00:00:00	00:00:00	0	00:09:07	00:02:4
2	Harold Kirk		available	00:14:06	2	0	00:01:31	00:00:45	5	00:00:00	00:12:3
3	John Smith		available	00:14:04	2	0	00:01:39	00:00:49	4	00:09:13	00:03:1
4	Vincent Warner		available	00:14:04	1	4	00:08:38	00:01:43	21	00:00:17	00:09:0
5	Jared Walter		available	00:14:02	1	0	00:00:31	00:00:31	1	00:00:22	00:11:3
6	Paul Baker		available	00:13:33	1	0	00:00:37	00:00:37	2	00:00:00	00:05:4
7	Gerald Blanchard		available	00:13:18	0	0	00:00:00	00:00:00	0	00:00:00	00:13:1
8	Cole Melendez		available	00:00:58	0	6	00:05:03	00:00:50	8	00:00:20	00:10:3
9	Khloe Bond		available	00:00:42	1	3	00:03:49	00:00:57	6	00:00:31	00:12:5

Listening to an Agent's Phone Call

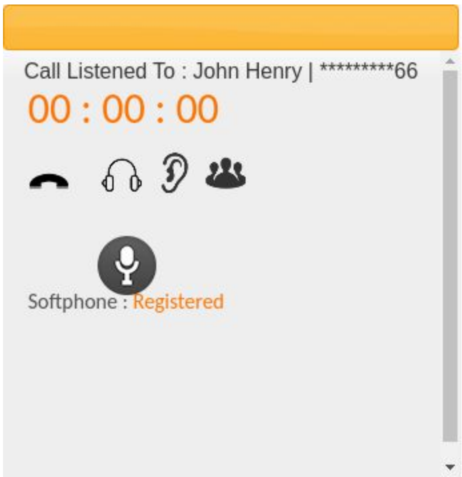
1. Click the button of the desired agent. This button is located to the left of the agent's name the following pop-up window will appear:



Note: the following options are only available when the agent is in "Talking" status:

- *Listen on the computer*
- *Listen on the phone*

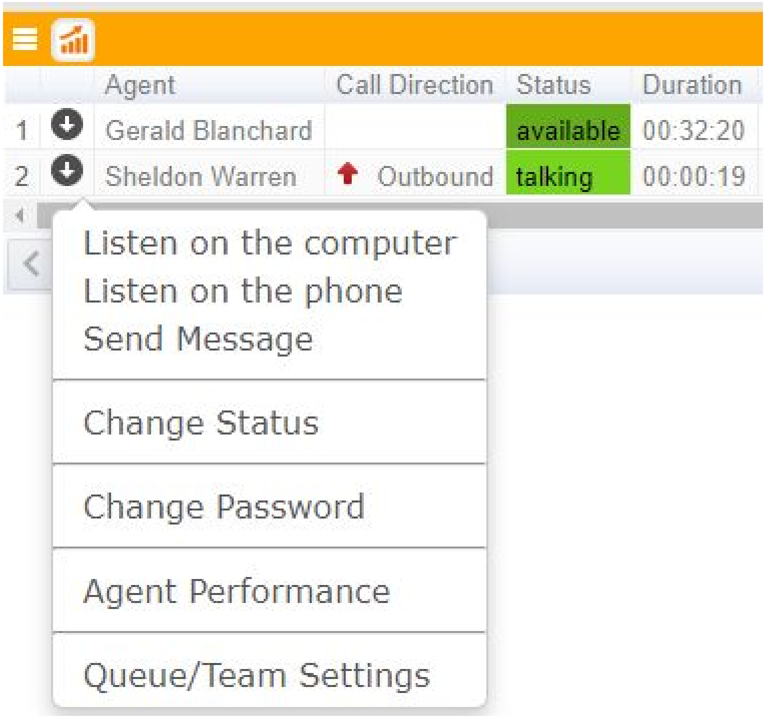
2. Click either "Listen on the computer" button or "Listen on the phone" button (If the supervisor has IP phone enabled), the following pop-up window will appear:



3. Click the "Listen" button, .
    - Click the "Whisper" button, . To support the agent, without joining the call.
    - Click the "Conference" button, . To support the agent, by joining the call.
4. Click the "Hangup" button, . To leave the call.

Sending a Message to an Agent

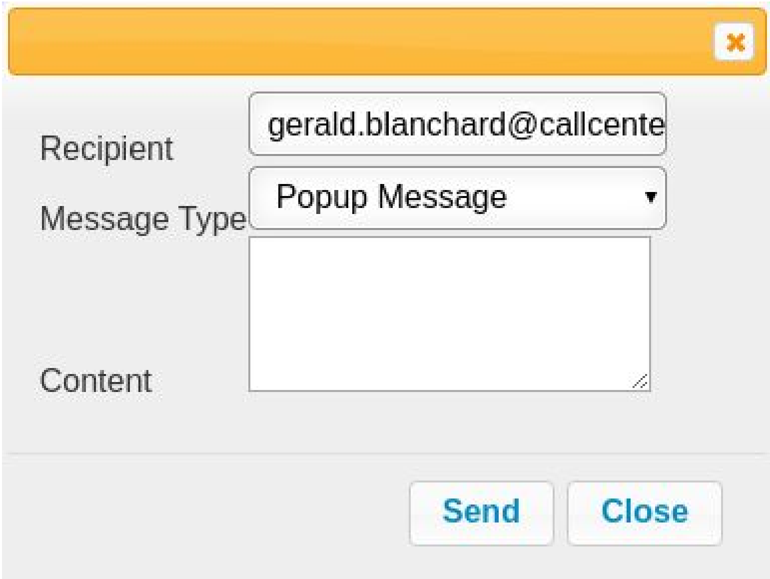
1. Click the button of the desired agent. This button is located to the left of the agent's name the following pop-up window will appear:



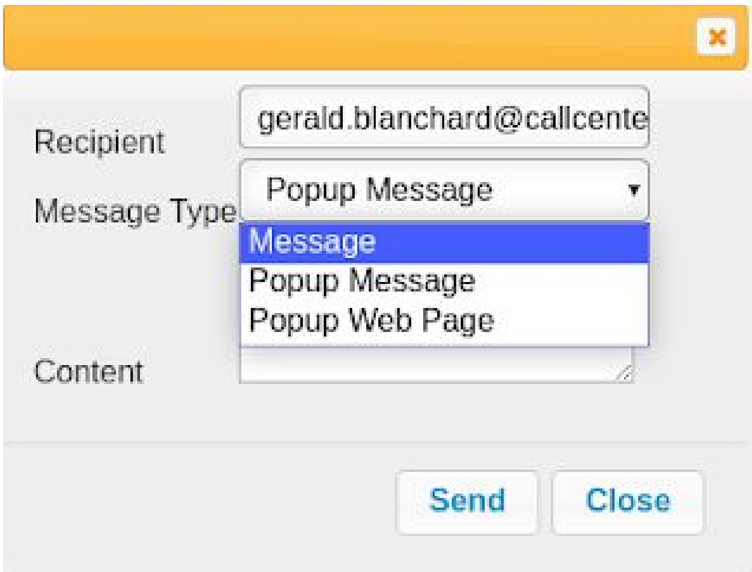
Note: the following options are only available when the agent is in "Talking" status:

- *Listen on the computer*
- *Listen on the phone*

5. Click the "Send Message" button; the following pop-up window will appear:



6. Click the 'Message Type" dropdown box. The following selections will appear:



7. Select the desired message type.

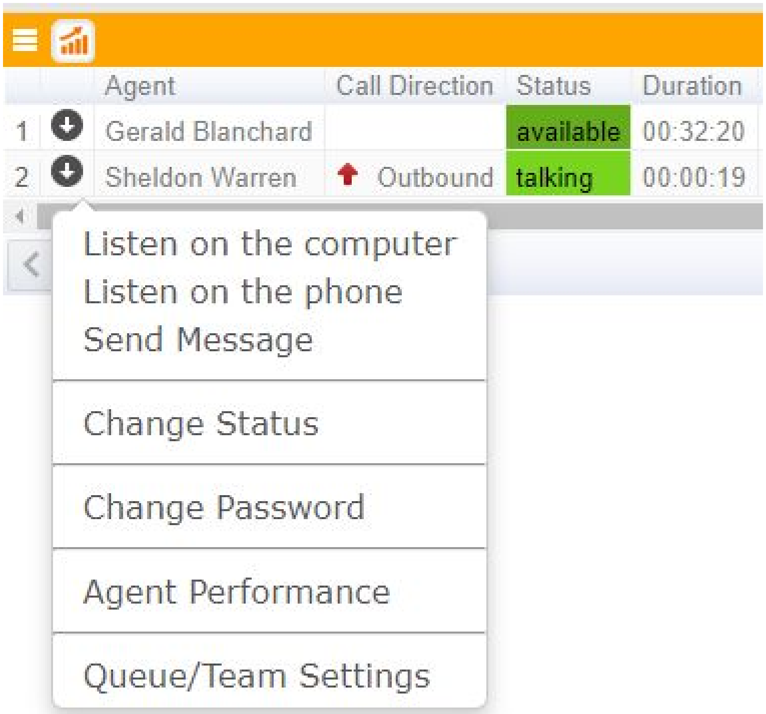
8. Click the "Content" input box, type the desired message.

9. Click the "Send" button, 

.

Changing an Agent's Status

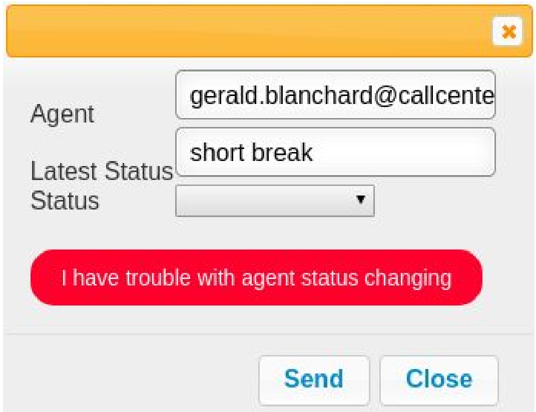
1. Click the button of the desired agent. This button is located to the left of the agent's name the following pop-up window will appear:



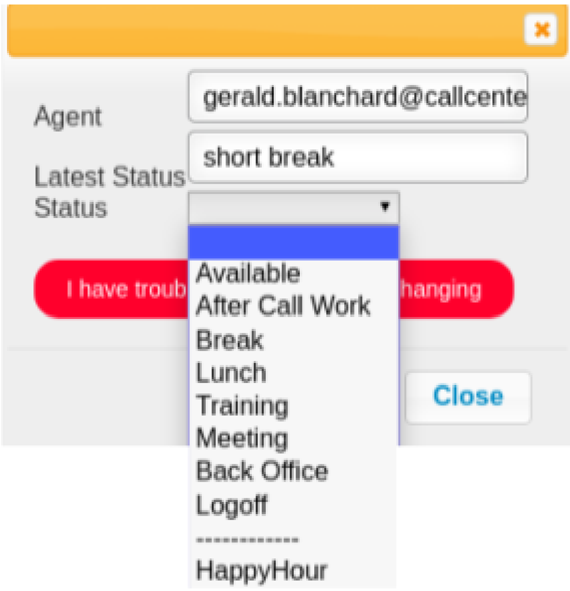
Note: the following options are only available when the agent is in "Talking" status:

- *Listen on the computer*
- *Listen on the phone*

2. Click the “Change Status” button; the following pop-up window will appear:



3. Click the “Status” dropdown box. The following drop-down menu will appear:



Note: Statuses below the dotted line are custom statuses created in the Statuses section of the administrator screen. Here a custom status is used to provide an example of how they appear on the supervisor screen.

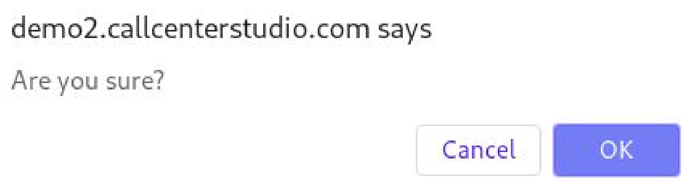
4. Make a status selection.

5. Click the "Send" button, 

.

Note: If you are having trouble making an agent status change, click the following button shown below:

The following pop-up window will appear:



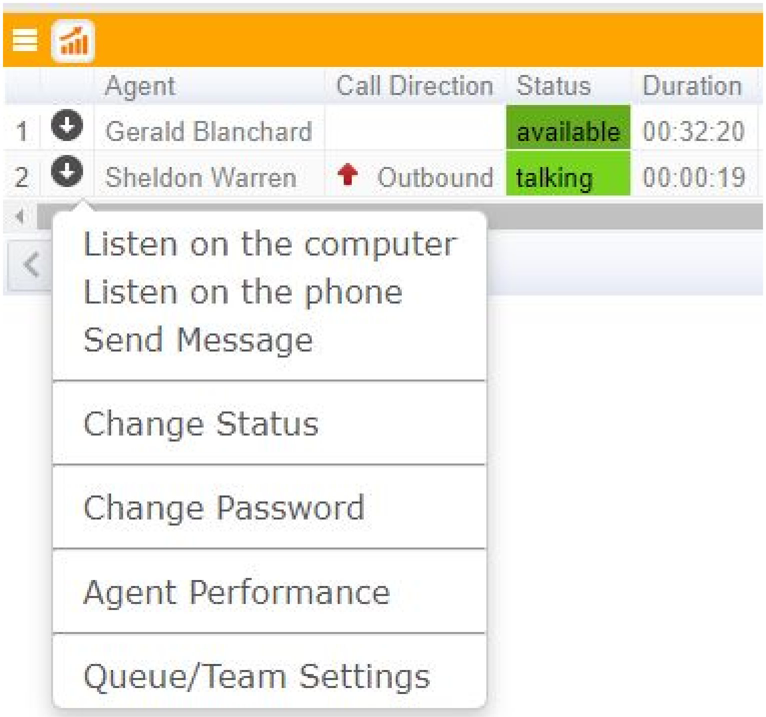
Note: This is using an example tenant; instead of demo2.callcenterstudio.com, it will be "YourDesiredTenantName."callcenterstudio.com.

Click the Okay button, 

.

Changing an Agent's Password

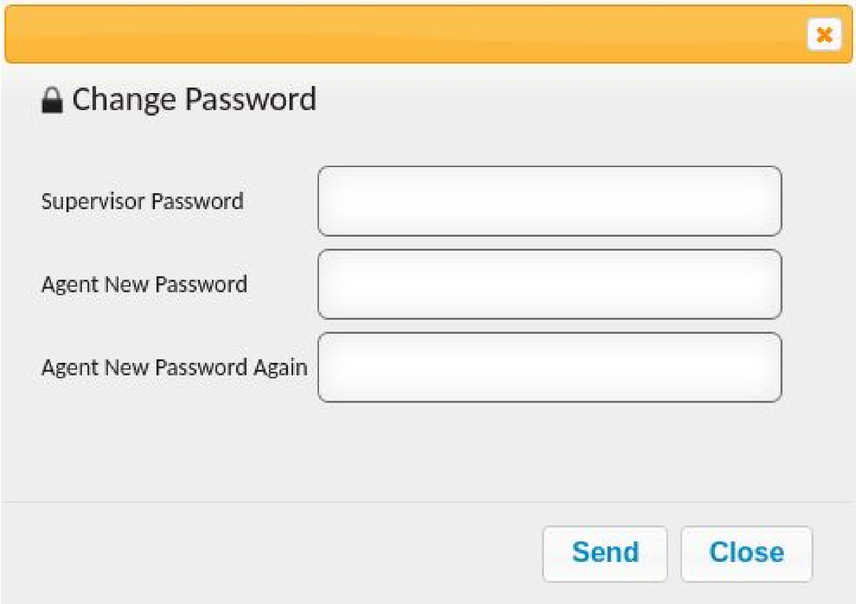
1. Click the button of the desired agent. This button is located to the left of the agent's name the following pop-up window will appear:

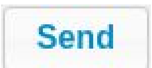


Note: the following options are only available when the agent is in "Talking" status:

- *Listen on the computer*
- *Listen on the phone*

2. Click the “Change Password” button. The. The following pop-up window will appear:



3. Click the “Supervisor Password” input box, type the password for the supervisor account in use.
4. Click the “Agent New Password” input box, type the agent’s desired new password.
5. Click the “Agent New Password Again” input box, type the agent’s desired new password again.
6. Click the “Save button, 

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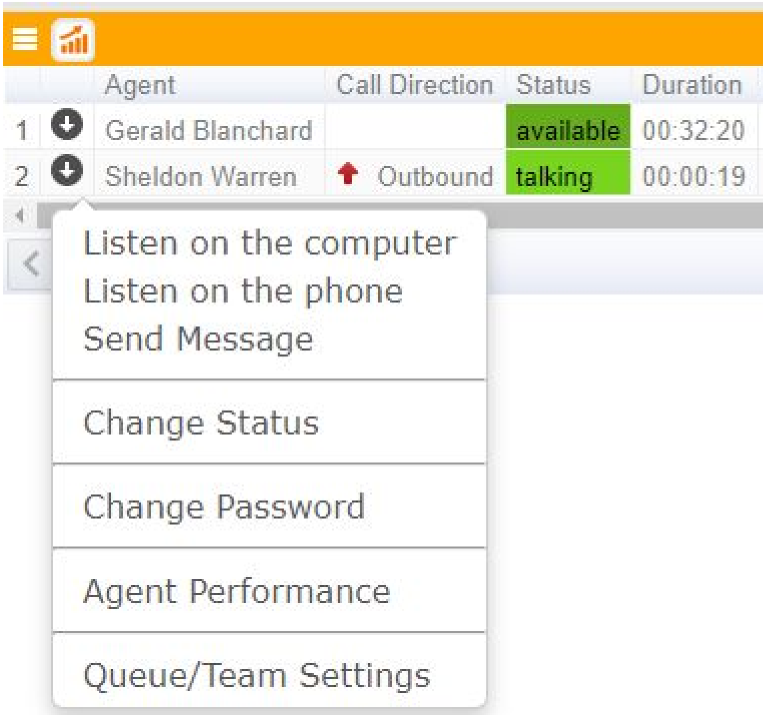
Viewing Agent's Performance

1. Click the button of the desired agent. This button is located to the left of the agent's name the following pop-up window will appear:



Note: the following options are only available when the agent is in "Talking" status:

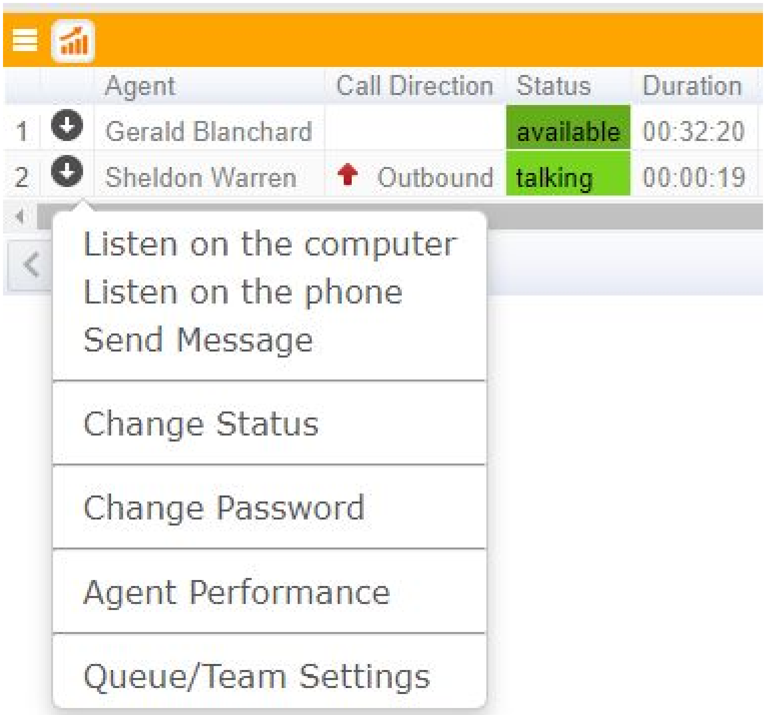
- *Listen on the computer*
- *Listen on the phone*

2. Click the "Agent Performance" button. The following pop-up window will appear:

3. After viewing, click the exit button located in the top left-hand corner of the pop-up window.

Changing Agent’s Queue / Team Settings

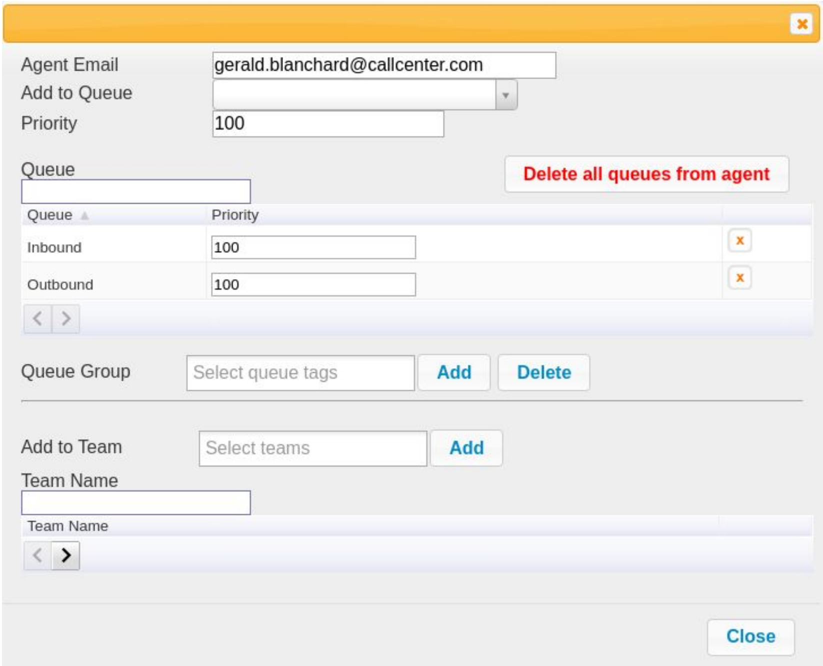
1. Click the button of the desired agent. This button is located to the left of the agent’s name the following pop-up window will appear:



Note: the following options are only available when the agent is in “Talking” status:

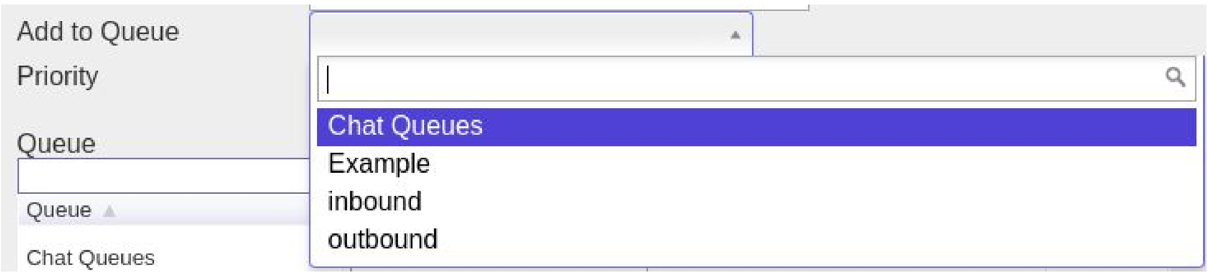
- *Listen on the computer*
- *Listen on the phone*

2. Click the “Queue / Team Settings” button. The following pop-up window will appear:



Adding Agent to a Queue

1. As you can see underneath the Agent Email, the agent can be added to multiple queues:



2. In most cases, the priority value is defined according to the user's level of experience and knowledge. For instance, in the example below, the priority value is set at 100 for John, meaning he will be the first to receive an inquiry within a defined queue.

3. 'Queue' Box allows the user to type the name of a queue manually. (For searching purposes)

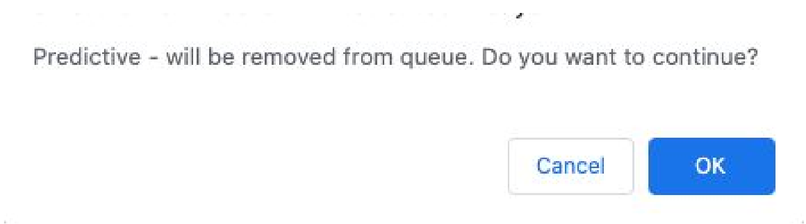
4. "Delete all queues from the agent" button is located right next to it, allowing the user to remove the agent from all the previously assigned queues.

5. Added queues and priority levels can be seen here.

Queue	Priority	
Predictive	100	x
Sales	100	x
Technical Support	100	x
Test_Q	100	x

<u>Deleting a Queue</u>

1. To delete queues from the user, click the delete button , located to the far right of the desired queue. When the delete button is clicked the following pop-up will appear:



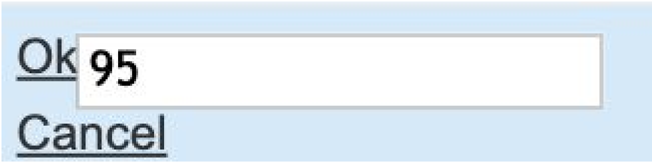
- *Select the cancel button, , will cancel the deletion.*
- *Select the OK button, OK, will confirm the deletion.*

2. Confirm the deletion by clicking the OK button, OK.

The screen will reload, and the deleted queue will not be shown.

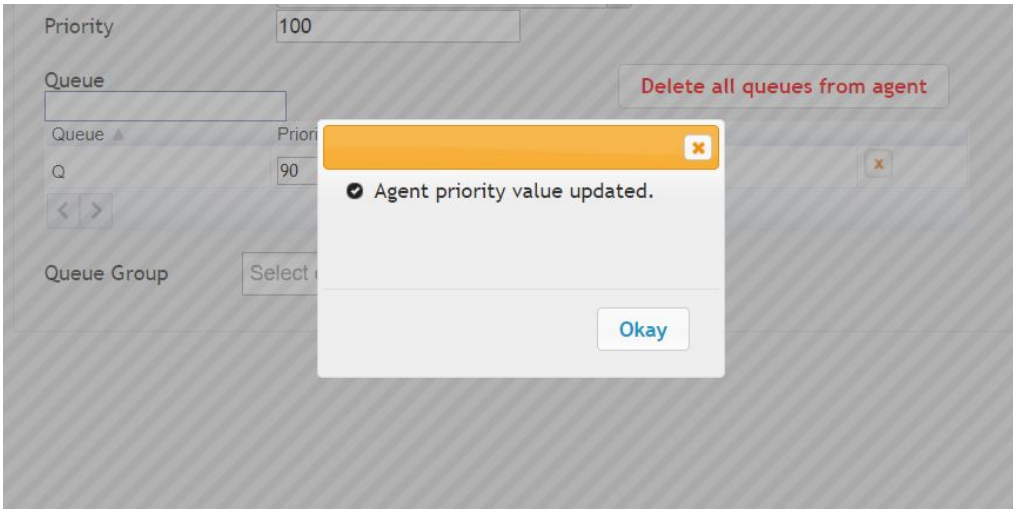
Changing the Priority level

1. Click the input box shown in the priority column and type the preferred priority level as described in adding a user section.



2. Click the Ok button, 

, to acknowledge the additions and to update the priority value.

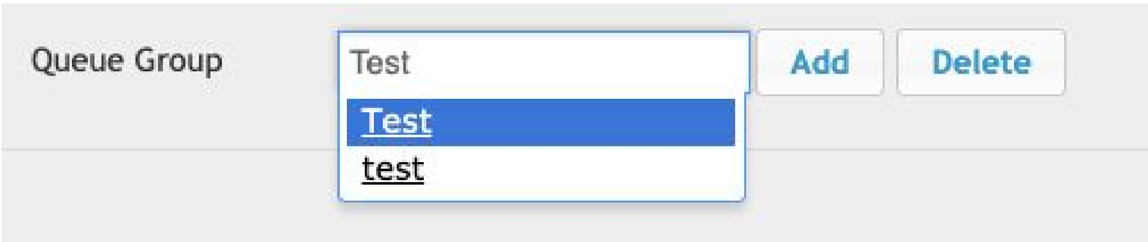


3. Click the cancel button, 

, to cancel the change.

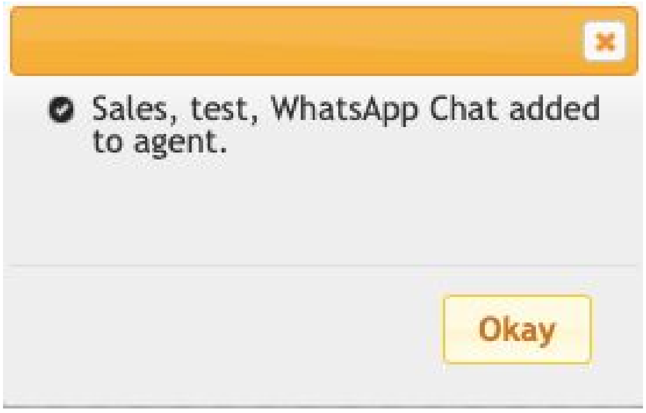
Adding an Agent to a Queue Group

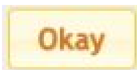
1. Click the desired "Queue group" to add the user to a queue group:



2. Once the queue group is selected, click the Add button, 

, When the add button is clicked the following pop-up will appear:

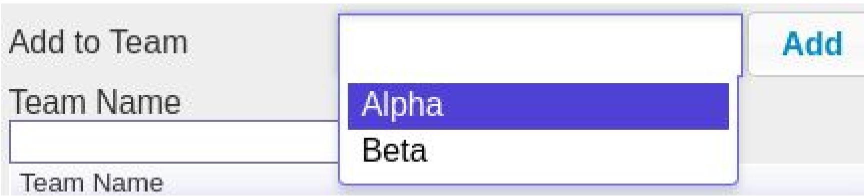


3. Select the Okay button, 

, to confirm the addition.

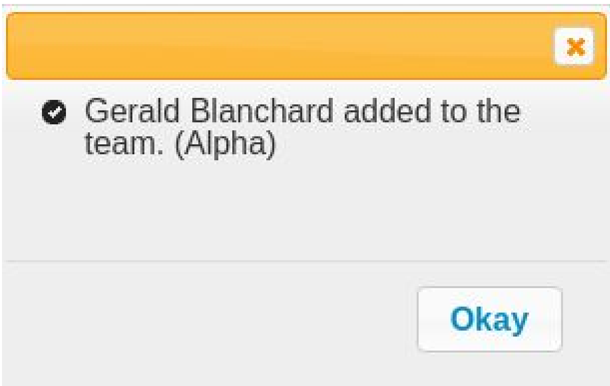
Adding an Agent to a Team

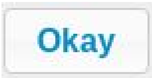
1. Click the "Add to Team" input box, the following dropdown menu with available teams will appear:



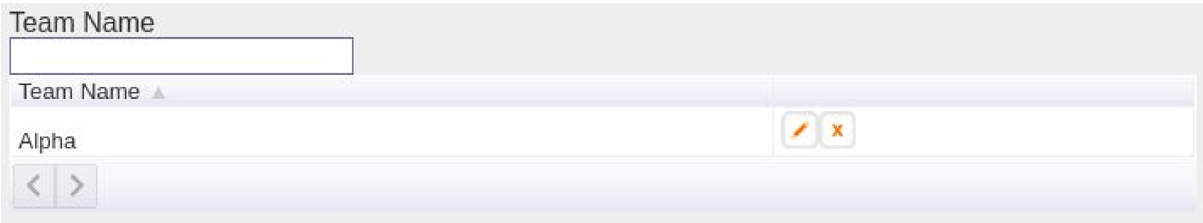
2. Select the desired team.
3. Click the "Add" button, 

. The following pop-up window will appear:



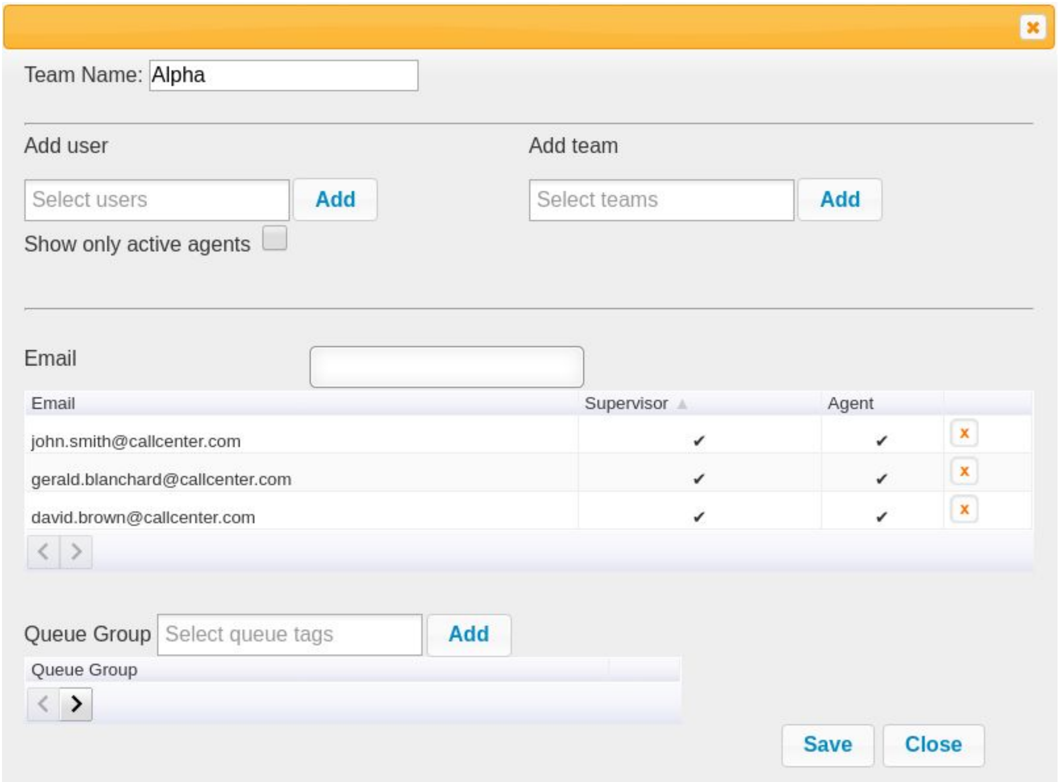
4. Click the "Okay" button, 

. The team list will show the updated team, as shown below:

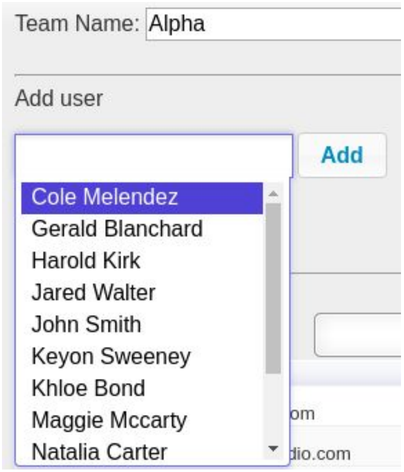


Editing a Team

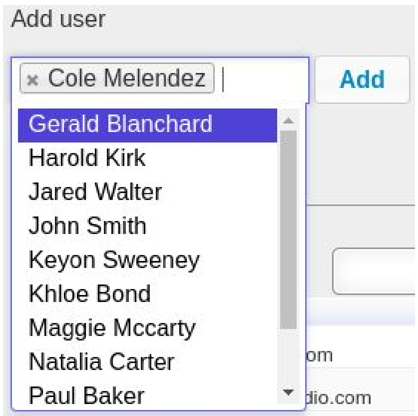
1. Click the edit button, , of the desired team from the individual Agent's Queue / Team Settings. The following window will appear:



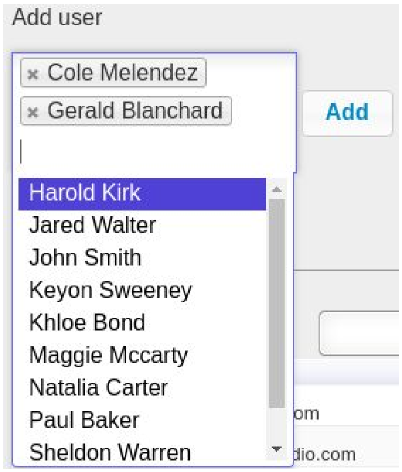
2. Add users to the team by clicking the "Select users" input box, a dropdown list of available users will appear, as shown below:



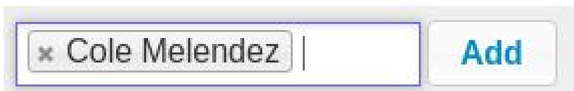
3. Click the desired user, "Cole Melendez," from the dropdown list, if down correctly the selection will look like the picture below:



Note: Multiple users can be added at the same time. For example, "Gerald Blanchard," can be selected, as shown below:



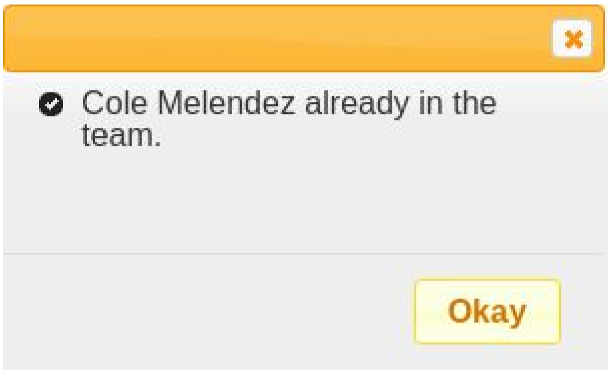
Both of the desired users were added to the input box above. If a user was clicked by accident, the user could be removed by pressing the, "X," to the left of the user's name:

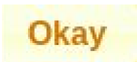


The user, "Gerald Blanchard," was deleted from the user add list shown above.

4. To add the user ("Cole Melendez") to the team, press the add button, 

, if done correctly the following pop-up window will be displayed:

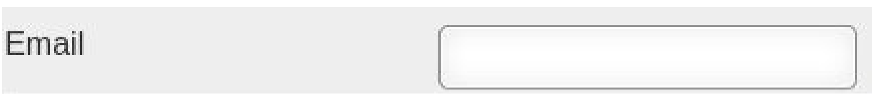


5. Click the Okay button, 

, once the user will appear in the list as shown below:

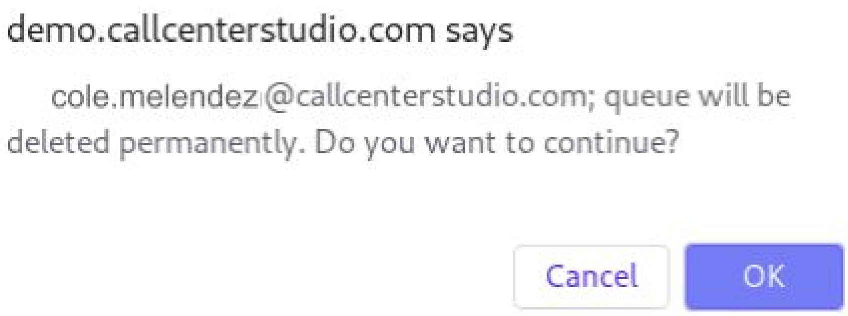
Note: Their access level is also listed. In this example, Cole is both a Supervisor and an Agent indicated by the checkmarks.

Click the input box to the right of Email, type the desired user's email. This search box can be used to find team members quickly, as shown below:



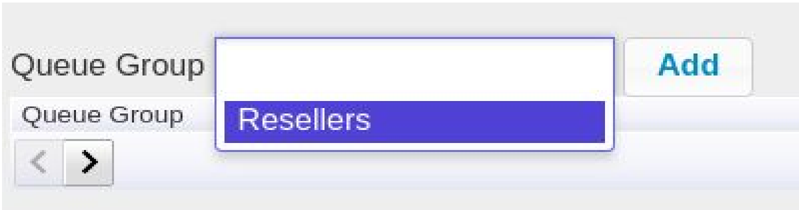
The search box can be used to search for users. Click the input box, type the user's email.

Team members can be deleted here by pressing, x, to the right of checkmarks. If the, x, is clicked the pop-up below will be shown to confirm the deletion:



- *Select the cancel button,* Cancel *, will cancel the deletion.*
- *Select the OK button,* OK*, will confirm the deletion.*

7. Once users are added, the team can be added to a queue. Add a team to a queue by clicking the "Select queue tags" input box, a dropdown list of available queues will appear, as shown below:



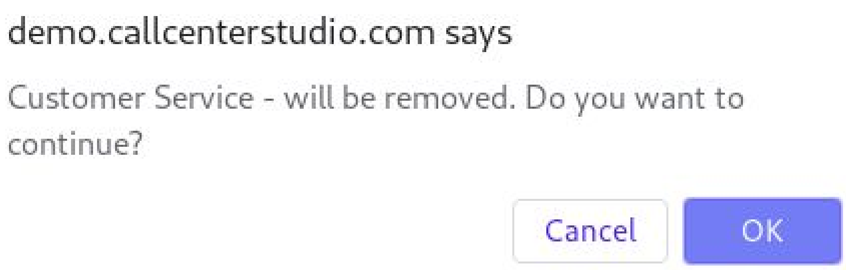
8. Click the desired queue, "Customer Service" (an example) from the dropdown list, if down correctly the selection will look like the picture below:

Note:

- *To facilitate speed in adding queues, multiple queues, if created, can also be selected, and added at the same time.*
- *Selected queues can also be deleted similar to users by clicking the, "X", to the left of the queue name.*

9. To add the queue ("Customer Service") to the team, press the add button, Add, if done correctly, the queue will be displayed under the "Queue Group" list as shown below:

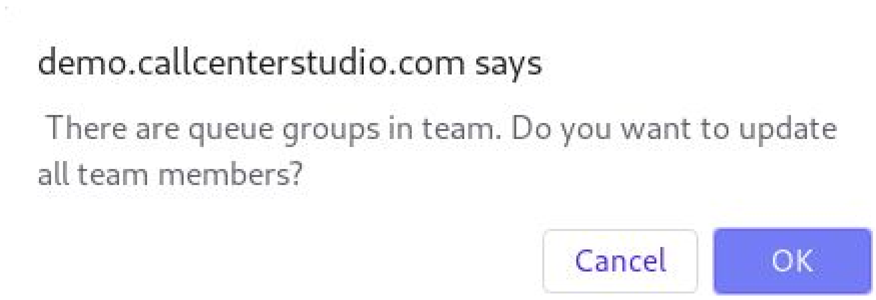
Queues can be deleted here as well by pressing, x*, to the right of the queue name. If the,* x*, is clicked the pop-up below will be shown to confirm the deletion:*



- *Select the cancel button,* Cancel*, will cancel the deletion.*
- *Select the OK button,* OK*, will confirm the deletion.*

10. Once the user and queue selection is complete, the information can be saved by clicking the save button, 

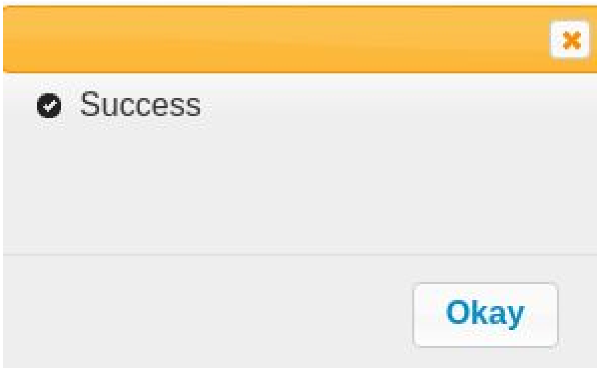
, the following pop-up box will appear:



11. Click the Ok button, 

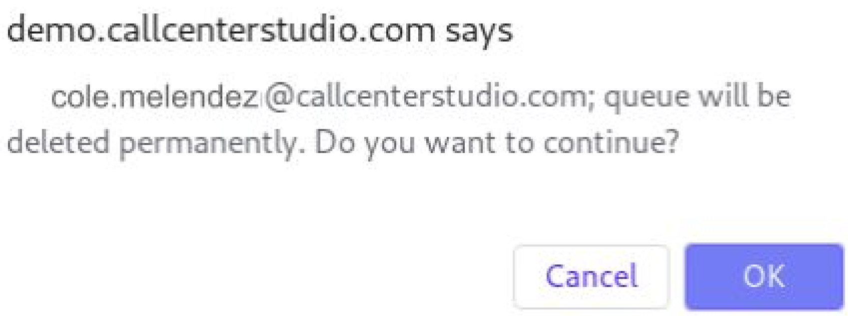
, to confirm the update.

After pressing the "Ok" button, the following pop-up window will be displayed:



<u>Deleting an Agent from a Team</u>

1. Click the delete button, x, of the desired team from the individual Agent's Queue / Team Settings. The following pop-up window will appear:

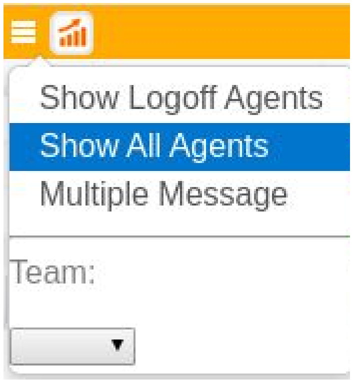


- *Select the cancel button,* Cancel *, will cancel the deletion.*
- *Select the OK button,* OK*, will confirm the deletion.*

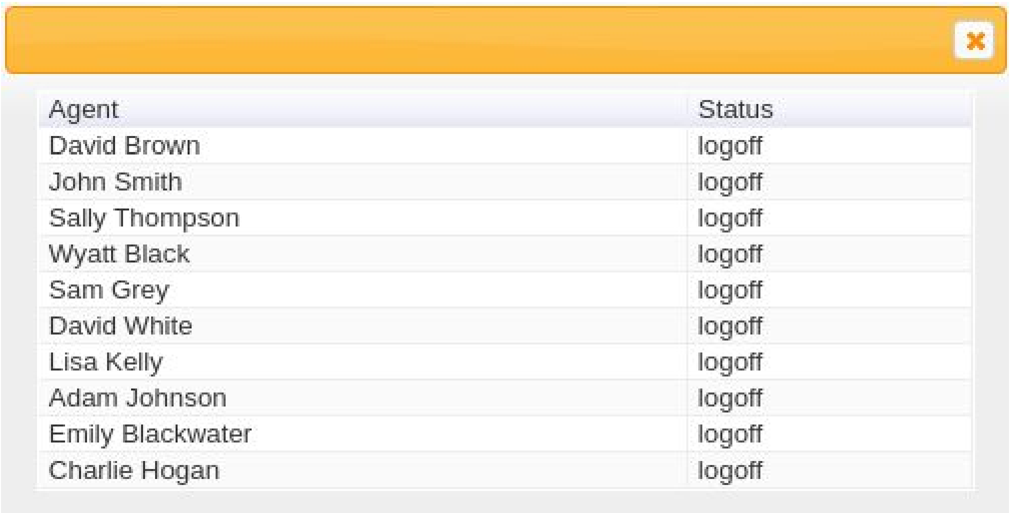
2. Confirm the deletion by clicking the OK button, OK.

Viewing Logged Off Agents

1. Click the button, located in the top left-hand corner of the Agent Status List. The following dropdown menu will appear:



2. Click the "Show Logoff Agents" button. The following pop-up window will appear:

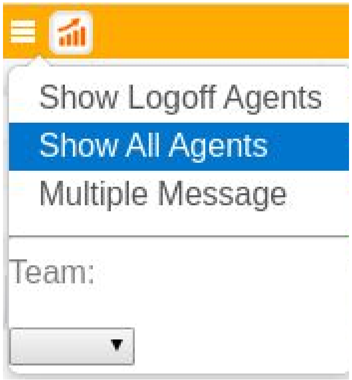


Agent	Status
David Brown	logoff
John Smith	logoff
Sally Thompson	logoff
Wyatt Black	logoff
Sam Grey	logoff
David White	logoff
Lisa Kelly	logoff
Adam Johnson	logoff
Emily Blackwater	logoff
Charlie Hogan	logoff

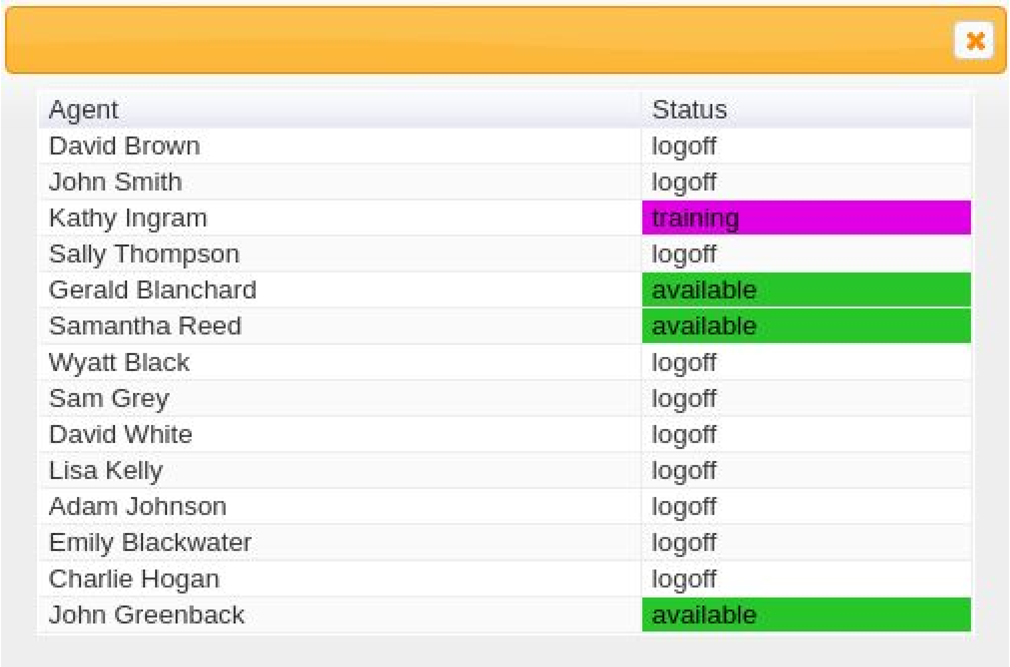
3. After viewing, click the exit button located in the top left-hand corner of the pop-up window.

Viewing All Agents

1. Click the button, located in the top left-hand corner of the Agent Status List. The following dropdown menu will appear:



2. Click the “Show All Agents” button. The following pop-up window will appear:

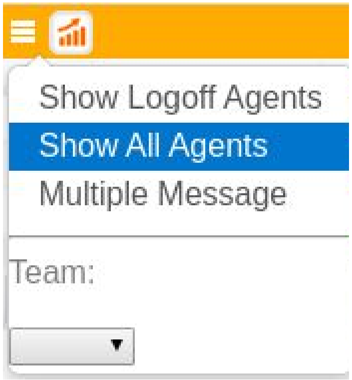


Agent	Status
David Brown	logoff
John Smith	logoff
Kathy Ingram	training
Sally Thompson	logoff
Gerald Blanchard	available
Samantha Reed	available
Wyatt Black	logoff
Sam Grey	logoff
David White	logoff
Lisa Kelly	logoff
Adam Johnson	logoff
Emily Blackwater	logoff
Charlie Hogan	logoff
John Greenback	available

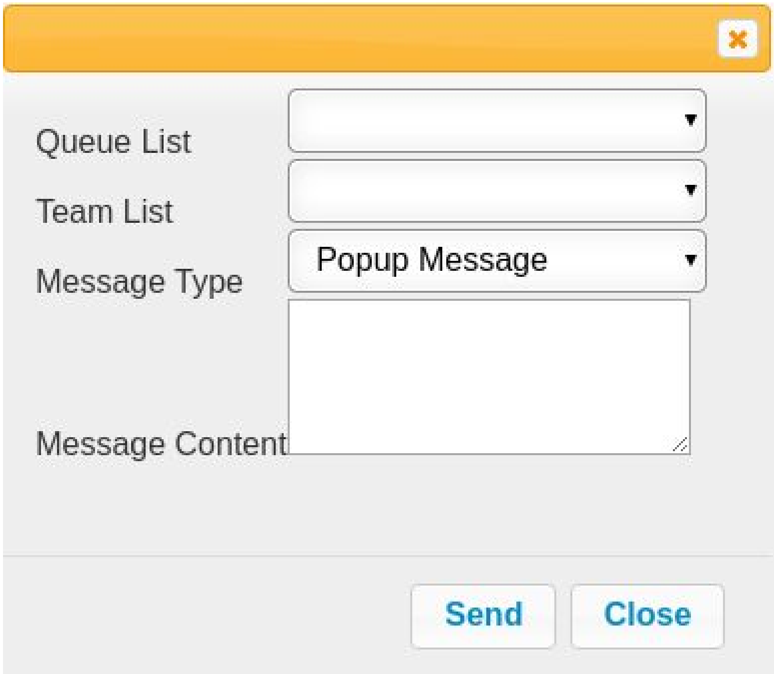
3. After viewing, click the exit button located in the top left-hand corner of the pop-up window.

Sending a Message to Multiple Agents

1. Click the button, located in the top left-hand corner of the Agent Status List. The following dropdown menu will appear:



2. Click the "Multiple Message" button. The following pop-up window will appear:



3. Click the "Queue List" dropdown box, select the desired queue.

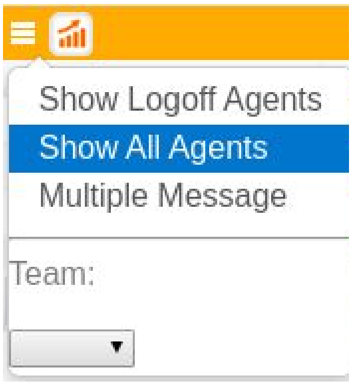
4. Click the "Team List" dropdown box, select the desired team.

5. Click the "Message Type" dropdown box, select the desired message type.
6. Click the "Message Content" input box, type the desired message.
7. Click the "Send" button, 

.

Filter Agent Status List by Team

1. Click the  button, located in the top left-hand corner of the Agent Status List. The following dropdown menu will appear:



2. Click the "Team" dropdown box, select the desired team. The updated agent status list will only show the members of the selected team.

Waiting Calls & Waiting Chats

Details about how many calls and chats are in waiting status and the queue with the longest wait time can be viewed here.

If desired, a waiting call or chat alarm can be created in the alarms menu, and it can be highlighted to catch the user's attention.

Waiting Calls

Queue	Call	Longest (Duration)
inbound	2	39
Total	2	39

Waiting Chats

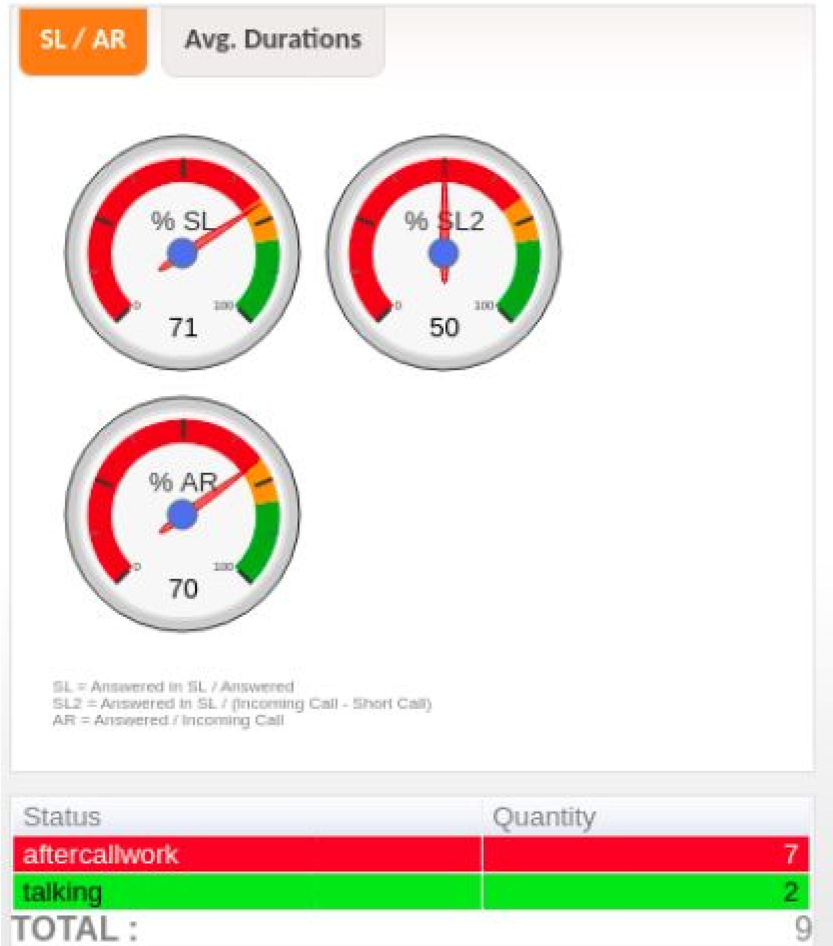
Queue	Chat	Longest (Duration) Chat
inbound	1	13
Total	1	13

Viewing Agent Performance Graphically

1. Click the  button, located in the top left-hand corner of the Agent Status List.

   The following graph will appear:

SL/AR and Average Holding Times



Service levels and answering ratios are displayed here:

SL Ratio:

$$\frac{\textit{Answered calls}}{\textit{Incoming call - Short call}}$$

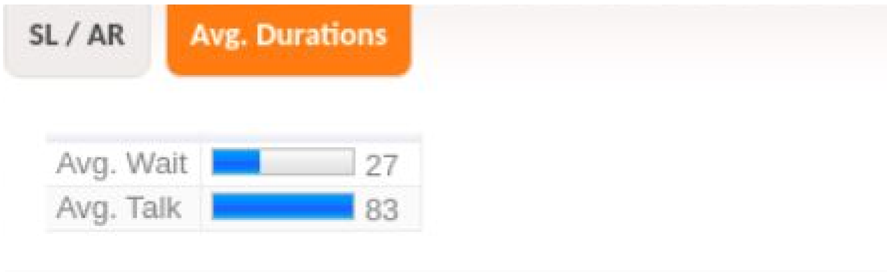
SL2 Ratio:

$$\frac{\textit{Calls answered in the service level}}{\textit{Incoming calls - Short calls}}$$

Answering Ratio (Answer Rate (AR)):

$$\frac{\textit{Answered calls}}{\textit{Incoming calls}}$$

Average Holding Times



Status

Statuses of customer representatives are listed in this module. Customer representatives can be filtered according to the related status in the agent status list by clicking the desired status in the list.

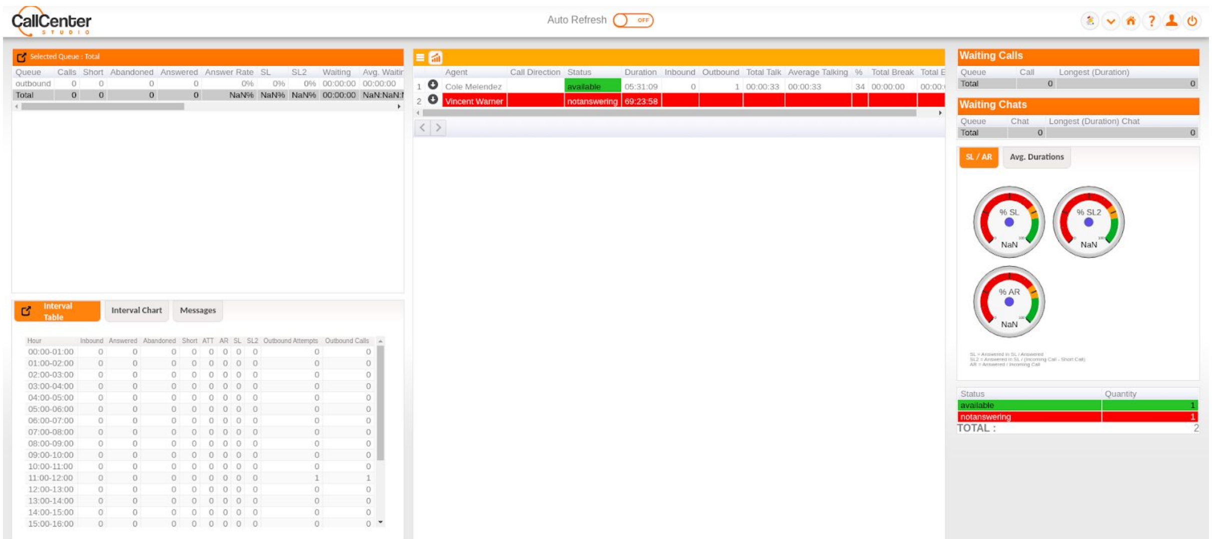
aftercallwork	1
available	20
backoffice	20
shortbreak	3
talking	25
training	10
wrapup	1
TOTAL	80

Queue Tab

The Queue tab button is used to refresh the default screen when the auto-refresh is not used.

1. In the top right section of the supervisor screen, click the  button, the following menu will appear below the button:

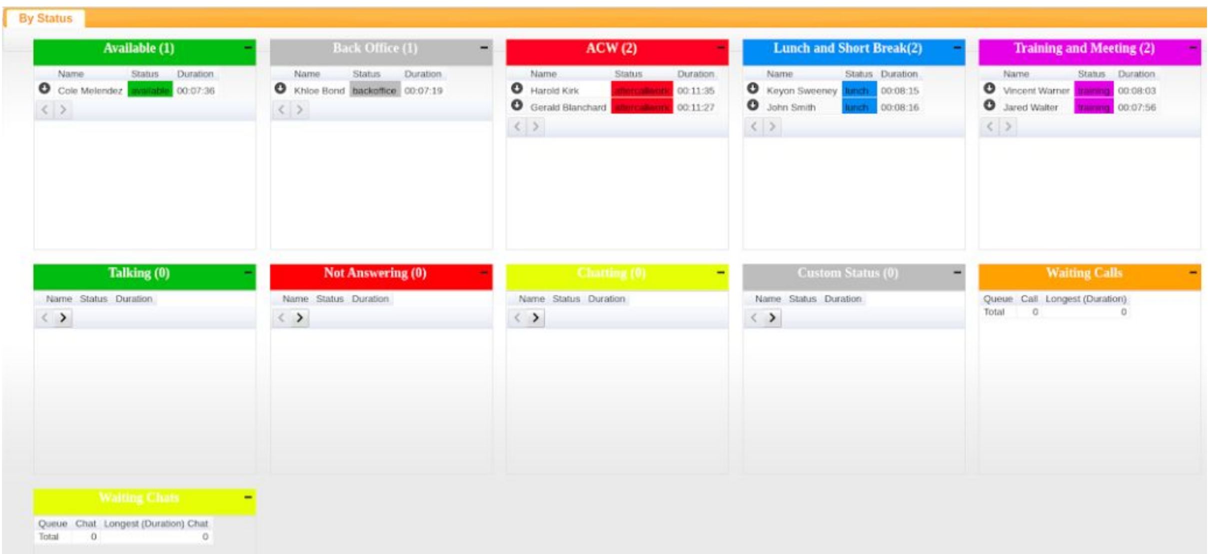
2. Select the “Queue” tab. The following screen will appear as a refreshed version of the default screen:



Agent Tab

1. In the top right section of the supervisor screen, click the  button, the following menu will appear below the button:

2. Select the “Agent” tab. The following screen will appear:



Agents can be followed according to status in this menu.

Call Tab

1. In the top right section of the supervisor screen, click the  button, the following menu will appear below the button:

2. Select the “Call” tab. The following screen will appear:

3. For a complete explanation of the Call Tab, see the Quality Control Section > Call Tab.

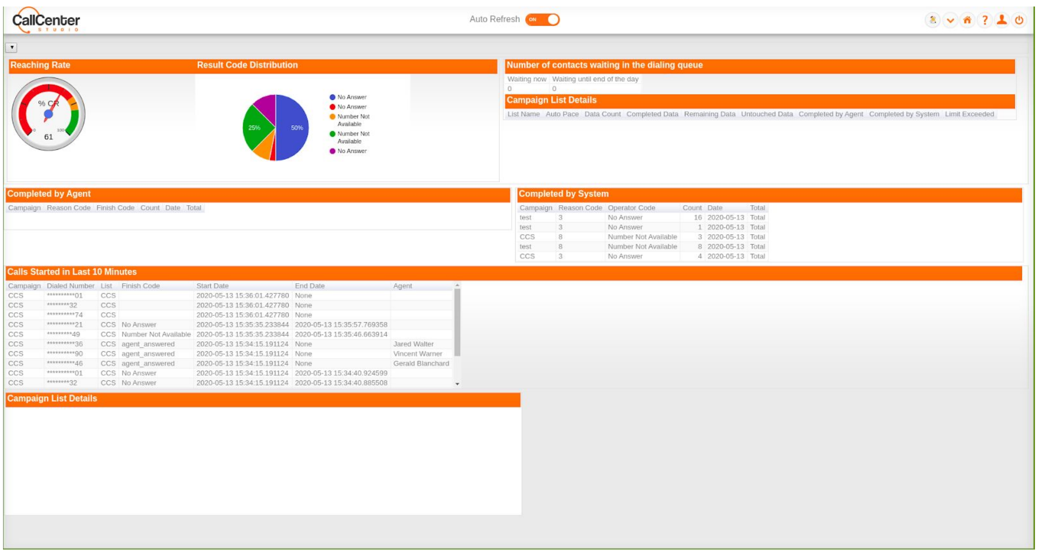
Campaign Tab

Campaigns are used for using the dialers built-in to Call Center Studio. Campaigns operate according to determined criteria.

If there is a campaign, details belonging to that campaign can be seen on the campaign screen. Such information as reaching ratios, distribution of result codes, loaded lists, metrics on calls completed, customer representative info, and result codes can be accessed. Moreover, the last 10-minute call logs called with Dialer System are also listed.

1. In the top right section of the supervisor screen, click the button, the following menu will appear below the button:

2. Select the "Campaign" tab. The following screen will appear:

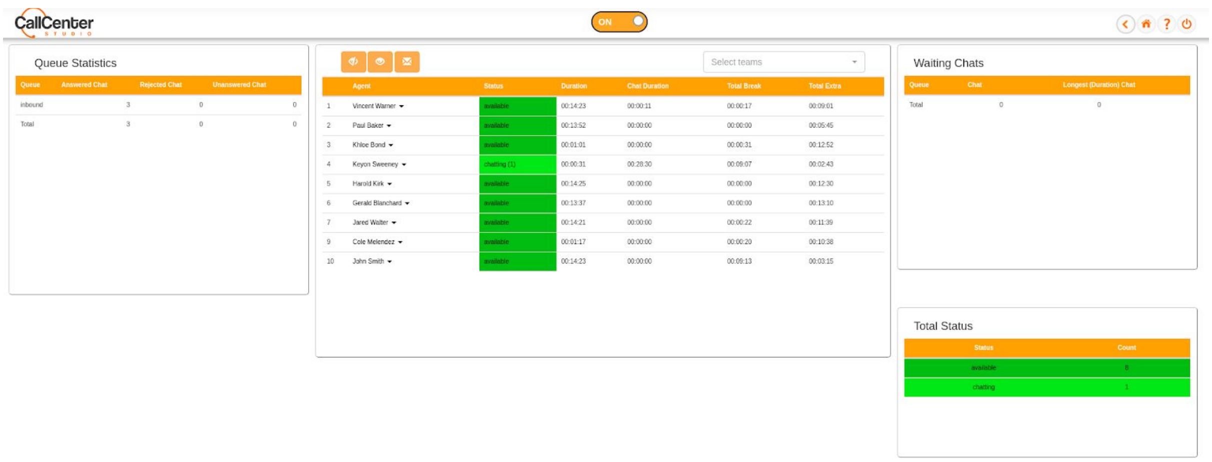


Chat Tab

The chat tab has similar features to the default supervisor screen, except it is solely used for monitoring chatting agents.

1. In the top right section of the supervisor screen, click the  button, the following menu will appear below the button:

2. Select the "Chat" tab. The following screen will appear:



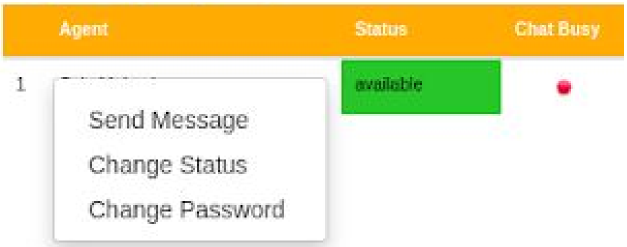
Agent Status List

The agent status list provides a quick overview of the agent's performance. Details length of status, duration, and chat totals are provided here. Agents can be messaged; their status can be changed along with their password.

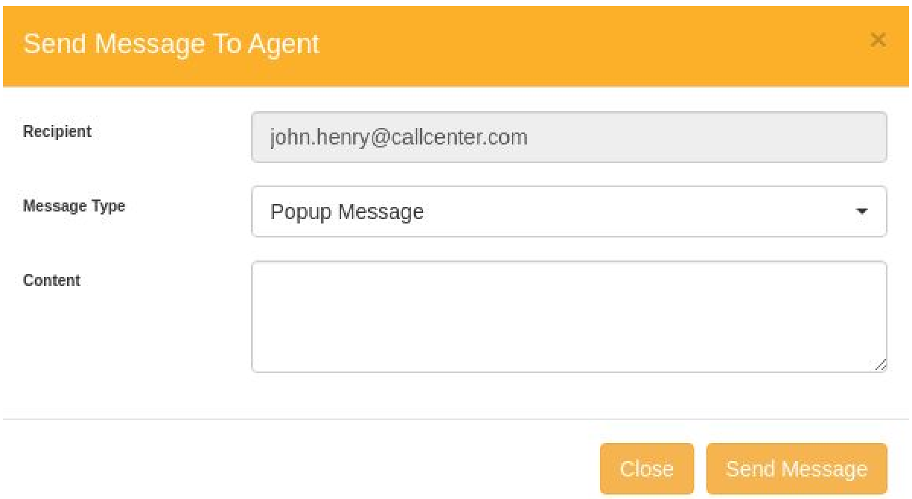
	Agent	Status	Duration	Chat Duration	Total Break	Total Extra
1	Vincent Warner	available	00:14:23	00:00:11	00:00:17	00:09:01
2	Paul Baker	available	00:13:52	00:00:00	00:00:00	00:05:45
3	Khloe Bond	available	00:01:01	00:00:00	00:00:31	00:12:52
4	Keyon Sweeney	chatting (1)	00:00:31	00:28:30	00:09:07	00:02:43
5	Harold Kirk	available	00:14:25	00:00:00	00:00:00	00:12:30
6	Gerald Blanchard	available	00:13:37	00:00:00	00:00:00	00:13:10
7	Jared Walter	available	00:14:21	00:00:00	00:00:22	00:11:39
9	Cole Melendez	available	00:01:17	00:00:00	00:00:20	00:10:38
10	John Smith	available	00:14:23	00:00:00	00:09:13	00:03:15

Sending a Message to an Agent

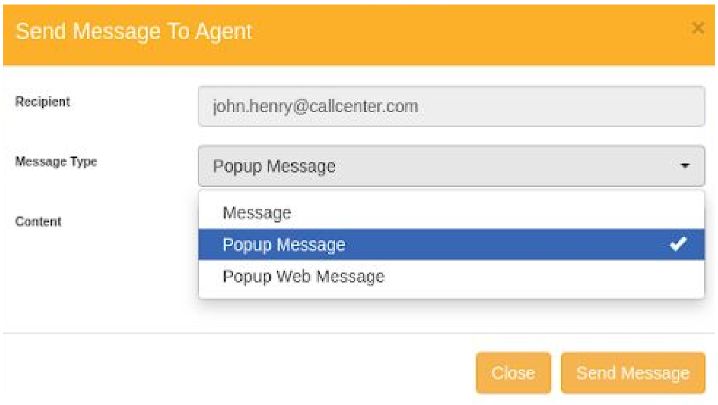
1. Click the desired agent name. The following pop-up window will appear:



2. Click the "Send Message" button. The following pop-up window will appear:



3. Click the 'Message Type" dropdown box the following selections will appear:



4. Select the desired message type.

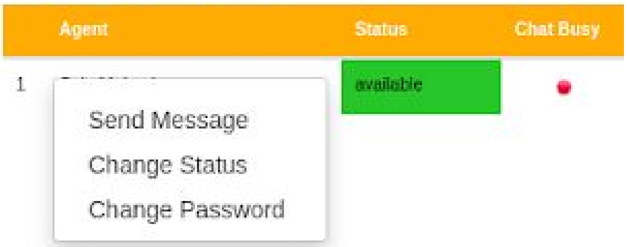
5. Click the "Content" input box, type the desired message.

6. Click the "Send Message" button, 

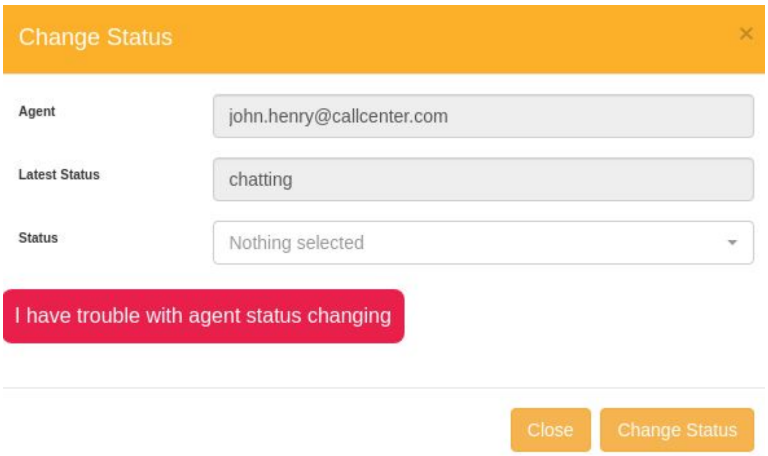
.

Changing an Agent’s Status

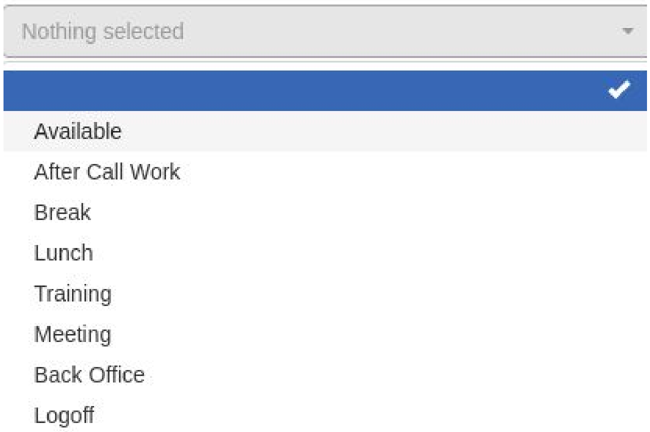
1. Click the desired agent name. The following pop-up window will appear:



2. Click the “Change Status” button. The following pop-up window will appear:



3. Click the “Status” dropdown box. The following drop-down menu will appear:

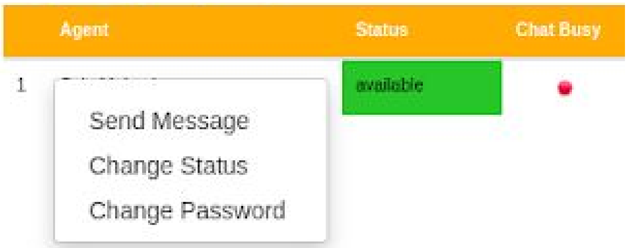


4. Make a status selection.
5. Click the “Change Status” button, 

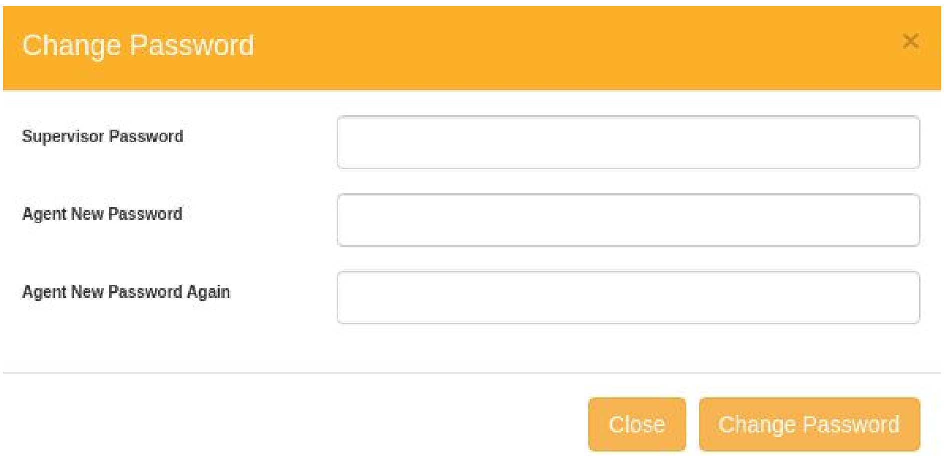
.

Changing an Agent's Password

1. Click the desired agent name. The following pop-up window will appear:



2. Click the "Change Password" button. The following pop-up window will appear:



3. Click the "Supervisor Password" input box, type the password for the supervisor account in use.
4. Click the "Agent New Password" input box, type the agent's desired new password.
5. Click the "Agent New Password Again" input box, type the agent's desired new password again.
6. Click the "Change Password" button, 

.

Viewing Logged Off Agents

1. Click the “Show All Agents” button, , located in the top left-hand corner of the Agent Status List. The following pop-up window will appear:

All Agents

Agent	Status
Cole Melendez	available
Gerald Blanchard	notanswering
Harold Kirk	logoff
Jared Walter	aftercallwork
John Henry	chatting
John Smith	notanswering
Keyon Sweeney	logoff
Khloe Bond	logoff
Maggie Mccarty	notanswering
Natalia Carter	logoff
Paul Baker	logoff

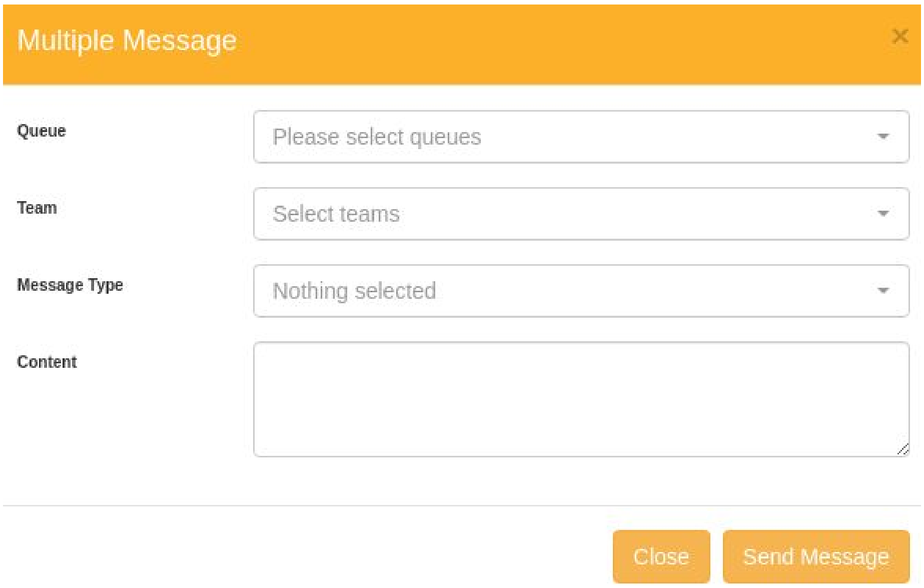
2. After viewing, click the close button, 

.

Sending a Message to Multiple Agents

1. Click the  button, located in the top left-hand corner of the Agent Status List.

   The following pop-up window will appear:

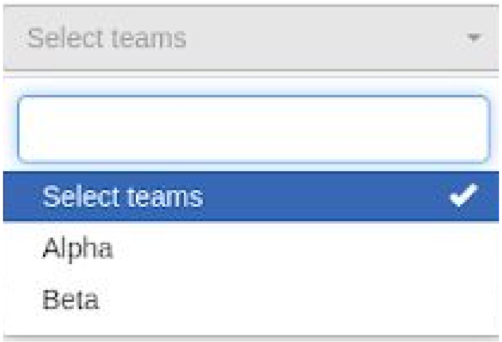


2. Click the “Queue List” dropdown box, select the desired queue.
3. Click the “Team List” dropdown box, select the desired team.
4. Click the “Message Type” dropdown box, select the desired message type.
5. Click the “Message Content” input box, type the desired message.
6. Click the “Send Message” button, 

.

Filter Agent Status List by Team

1. Click the "Team" dropdown menu, located in the top right-hand corner of the Agent Status List. The following dropdown menu will appear:



2. Select the desired team. The updated agent status list will only show the members of the selected team.

Queue Statistics

The queue statistics window displays information regarding the chat queues. Information such as answered chats rejected chats, and unanswered chats can be found here.

Queue Statistics

Queue	Answered Chat	Rejected Chat	Unanswered Chat
Chat Queues	2	0	1
Total	2	0	1

Waiting Chats

The waiting chats window displays information regarding the chats waiting in the queues. Information such as the number of waiting chats and the longest duration are shown here.

Waiting Chats

Queue	Chat	Longest (Duration) Chat
Chat Queues	1	17
Total	1	17

Status

Statuses of customer representatives are listed in this module. Moreover, customer representatives can be filtered according to the related status in the agent status list by clicking the desired status in the list.

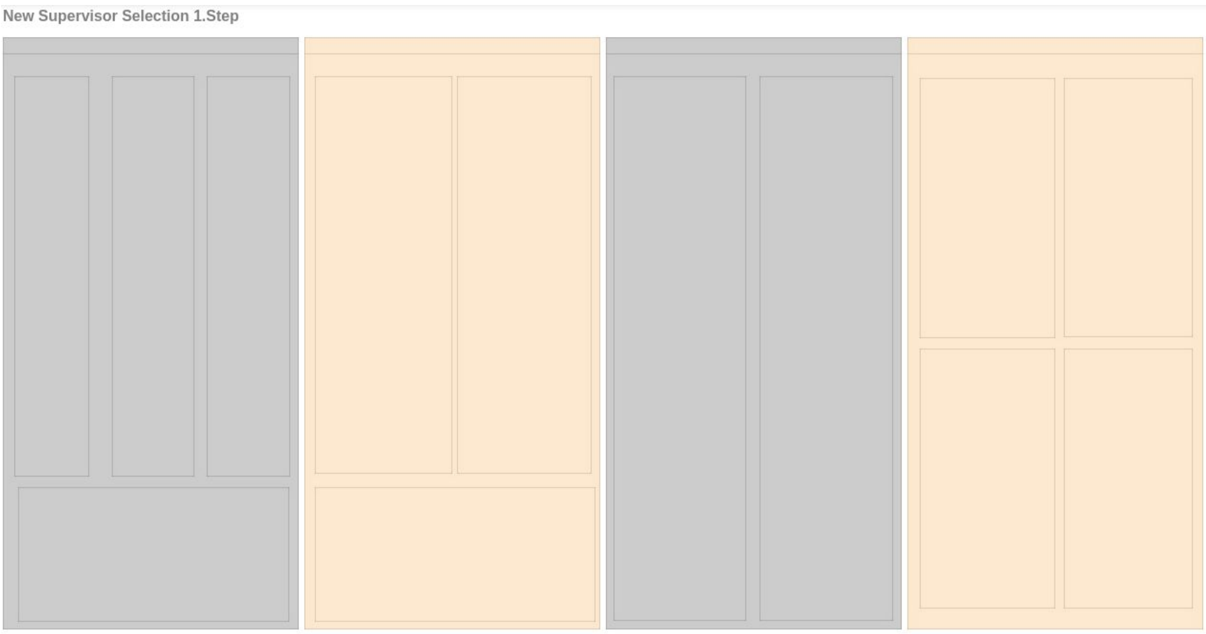
Total Status

Status	Count
available	1
notanswering	3

Creating the Custom Supervisor Screen

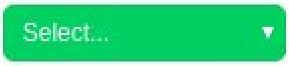
Used to create a custom supervisor screen according to the supervisor's visual and metric-based needs.

1. In the top right section of the supervisor screen, click the  button, the following screen will appear:



This screen provides four different ways to organize the supervisor's desired data.

2. Select the desired pane. The following screen will appear (For this example the first pane was selected):

3. Select the 

. The following dropdown menu will appear:

4. Select the desired metrics for the section.

Note: Once a metric selection is made, it cannot be selected again for a different section within the pane. If desired, it can be deselected by clicking the  *button located to the far right of the metric's name. To assist in not making a duplicate selection, if the parameter has been selected, it will be shown in red on the dropdown menu. An example is shown below:*

Note: Queue Performance was selected for a different section within the pane and is highlighted in red to notify the supervisor.

5. Repeat step 4 for all of the sections within the pane.
6. Once all of the desired selections have been made, click the "Complete" button, 

. The custom supervisor screen will be displayed.

Note: To return to the default supervisor screen, click the "Default Supervisor" button, 
.

Editing the Custom Supervisor Screen

1. In the top right section of the supervisor screen, click the button, the custom supervisor screen will appear.
2. In the top right section of the custom supervisor screen, click the "Update Supervisor" button, , the custom supervisor screen will appear (using the previously selected pane).

Note: To change the pane view, simply click the "Back" button, Back .

3. Make the desired changes.
4. Once all of the desired selections have been made, click the "Complete" button, Complete . The updated custom supervisor screen will be displayed.

Note: To return to the default supervisor screen, click the "Default Supervisor" button, .